

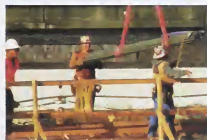
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FINDINGS

FROM THE 2009 COMMERCE & INDUSTRY INVENTORY

SAN FRANCISCO ECONOMY IN 2008: HOLDING STEADY

Employment Continues Recovery

In 2008, there were almost 571,000 jobs in San Francisco, an increase of about 14,400 jobs or 2.6% growth from the previous year. San Francisco employment continues to grow and is at its highest level since 2001. Overall employment, however, is still down about 6.2% from the high of 608,270 jobs in 2000 (see Figure 1). Office, Retail, and Cultural/ Institutional/ Educational (CIE), and Hotel sectors also gained jobs in 2008, while the Production/Distribution/ Repair (PDR) sector posted a slight loss (see Table 3.1).

Office Employment Up

For the fourth year in a row, the number of office workers grew, showing an increase of 3.1% in 2008. Office is the largest employment sector, representing 38.8% of the workforce in San Francisco. The addition of some 6,590 new jobs in 2008 brings this sector's total jobs to 221,250 (see Figure 2). However, this is still almost 9% below the 2000 high of 243,290. Within the office sector, Public Administration and Office Services gained more than 7,750 workers, while Finance and Insurance jobs decreased. The distribution of other office sub-sector jobs largely remained the same (see Table 3.2.1). The number of office establishments increased by 1% from 2007

FIGURE 1 EMPLOYMENT IN SAN FRANCISCO FROM 1999-2008

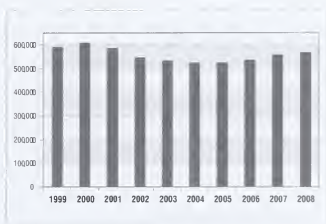
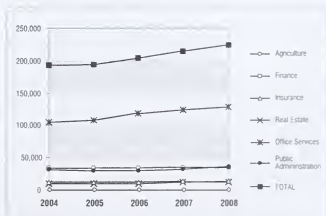


FIGURE 2 OFFICE EMPLOYMENT FROM 2004-2008



Production, Distribution and Repair Jobs Decline Slightly

The number of Production, Distribution, and Repair (PDR) workers decreased in 2008. However, the decline was minimal – only 275 workers or -0.3% (see Figure 3). This sector, with some 84,710 workers, makes up 14.8% of the total workforce. The PDR sector, in decline in the last decade, has exhibited a 9.6% drop in employment from 2004. Still, in 2008, the Utilities sub-sector of PDR employment showed an 11% gain. The number of PDR establishments decreased 0.8% to just over 4,840 (see Tables 3.2.3 and 4.2.3).

Cultural, Institutional, and Educational Jobs and Establishments Continue To Grow

Cultural, Institutional and Educational (CIE) is San Francisco's second biggest employment sector with about 141,850 workers. For the sixth straight year, there has been steady growth in CIE jobs, including a 4.8% increase since 2007 and an 10.8% increase since 2004 (see Figure 4). In 2008, every sub-sector of CIE employment grew, with the exception of Art and Recreation and Health Care which were both down slightly. CIE has the most number of establishments among all sectors – over 24,890 – largely driven by the number of small day care establishments and home-based businesses (see Tables 3.2.4 and 4.2.4).

Retail Sector Still Recovering

Retail jobs increased 1.2% in 2008 to just over 103,440 – almost back to the recent historic high of 103,508 in 2000. Employment in the Food Stores and Eating and Drinking Places sub-sectors grew while the other sub-sectors experienced job losses (see Figure 5).

Retail sales also grew for the fifth consecutive year, totalling \$10.29 billion in 2008. Adjusting for inflation, however, this represents a drop of 0.2% from 2007 but an increase of 9.1% since 2004. Moreover, retail sales in 2008 are almost 5% lower than their historic peak in 2000 (see Table 5.2.1).

The number of retail establishments increased by 1.1% in 2008 to a total of some 7,470 retail establishments (see Tables 3.2.2 and 4.2.2).

FIGURE 3 PDR EMPLOYMENT FROM 2004-2008

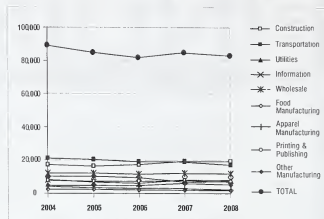


FIGURE 4 CULTURAL/INSTITUTIONAL/EDUCATIONAL EMPLOYMENT FROM 2004-2008

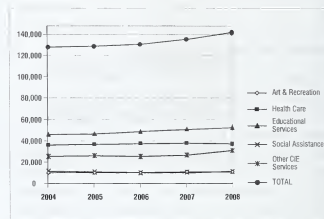
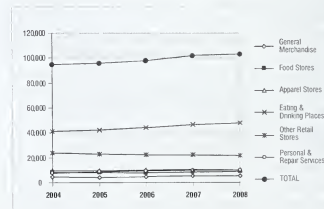


FIGURE 5 RETAIL EMPLOYMENT FROM 2004-2008

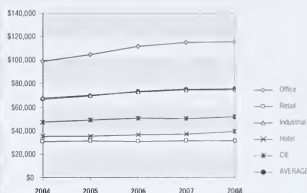


Average Wages Fall Slightly

Real wages fell in 2008 after having risen for four consecutive years (see Figure 6). The \$75,890 per worker average represents a 2.2% decrease from 2007. Only the Hotel sector experienced an average wage increase in 2008.

Office workers continue to be the most highly compensated, at an average of \$115,455 per year (see Table 5.1.2).

FIGURE 6 REAL WAGES FROM 2004-2008

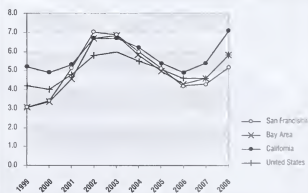


Bay Area Jobs Grow But Unemployment is Also Up

Bay Area employment continued to increase in 2008, recovering from four years of decline that marked the dot-com bust of the early 2000s. The addition of some 17,700 new jobs brought the Bay Area total to 3.485 million employed residents in 2008. This represents an increase of almost 0.5%. However, this is still 3.5% lower than the high of 3.61 million workers in 2000. The number of employed San Francisco residents increased from 415,000 to 427,000 or 2.9% (see Table 2.1.3).

While regional employment increased slightly, regional unemployment increased substantially for the second consecutive year (see Figure 7). In 2008, 5.8% of Bay Area workers were unemployed, up from 4.6% in 2007, but still down from a recent high of 6.8% in 2003. Still, unemployment rates were much higher than the low of 3.0% in 1999, at the height of the dot.com boom. Trends are similar in San Francisco, where 5.3% of residents were unemployed in 2008. This is up from 4.3% in 2007 but lower than the recent high of 7.0% in 2002. It still represents a much higher rate of unemployment than the recent low of 3.1% of 1999 (see Tables 2.1.2 and 2.1.4).

FIGURE 7 BAY AREA UNEMPLOYMENT FROM 1999-2008





1.0 INTRODUCTION

1.1 CONTEXT

This is the fifteenth *Commerce and Industry Inventory* prepared by the San Francisco Planning Department. It contains data for calendar year 2008. The immediate goal of this annual Inventory is to make local land use-related economic data available to community groups, businesses, and private and public agencies. The long-term goal is to establish a consistent time series of economic activity data and compile background information for updating the *Commerce and Industry Element* of the *San Francisco General Plan*. The analysis of economic trends and policy recommendations regarding economic activity in San Francisco are also contained in various documents published periodically by the San Francisco Planning Department.

This Inventory provides information on economic activities in San Francisco. It includes population, labor force, employment, establishments, wages, retail sales, government expenditures and revenues, and building activity data in San Francisco from 1999 through 2008. In addition, the data for previous years are revised when more accurate information was available during the preparation of this current publication.

The Inventory is organized into seven chapters.

- **Chapter 1 – Introduction** contains the context provided above. The remainder of the chapter defines the data formats, economic indicators and the variables contained within each data set, and two industry classification systems used in the Inventory to present the economic data in chapters 2 through 5.
- **Chapter 2 – Regional Overview** presents San Francisco's economy in its historical and geographical context by reviewing population, labor force, employment, and unemployment indicators for the San Francisco Bay Area. This information is presented by four subregions of the Bay Area: North Bay, East Bay, South Bay, and San Francisco. Unemployment data for the Bay Area, California, and the United States are presented as well.
- **Chapter 3 – Employment** presents information on San Francisco's employment from 1999-2008 in three predefined data formats which are: Industry Group, Land Use Category, and Commerce and Industry (C&I) District. These data formats are explained in Chapter 1 – Data Formats.

1.2 DATA FORMATS

- **Chapter 4 – Establishments** reports the number of establishments as places where businesses are operated or where service and PDR operations are performed. The chapter presents data on the number and distribution of active business establishments by Industry Group, Land Use Category, and Commerce & Industry District, and Establishment Size-class.
- **Chapter 5 – Monetary Transactions** measures various aspects of the city's economy in monetary terms. This chapter provides data related to wages, taxable retail sales and sales permits, city government revenues and expenditures. Wage data are presented by Land Use Category. Taxable retail sales and permits data are presented by type of business. City government revenues and expenditures are reported by source and function.
- **Chapter 6 – Building and Land Use** provides information regarding construction activity in San Francisco. It presents the number of building permit applications and the total construction cost related to permit applications from 1999 to 2008. The permit applications by permit status are reported only for 2008. This chapter also contains statistics on land use in San Francisco. The data in this chapter are derived from the San Francisco Department of Building Inspection and are summarized by Neighborhood Planning Area rather than Commerce & Industry district boundaries used in chapters 2 through 5.
- **Chapter 7 – Transportation** describes recent trends in San Francisco's transportation and transit systems. This includes analysis of mode split (i.e., what kind of transportation people use to complete their trips), parking availability, vehicle occupancy (i.e., the number of people per private vehicle), transit service, and Transit Impact Development Fee (TIDF) revenues).

The economic data in the Inventory are presented in terms of time, type of activity, and geographic distribution. The economic indicators are measured by their specific units such as employees, establishments, and dollars. The Inventory provides a framework for comparisons, cross-references, and cross-tabulations among various economic indicators by using three specific data formats or groupings of the data:

- Commerce and Industry Districts;
- Land Use Category; and
- Industry Group.

These data groups are discussed below. To the extent possible, the data in the Inventory, which are gathered from different sources, are aggregated into these three pre-defined formats. Some of the data remain in their original formats because of limited detail in the original data source.

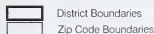
Commerce & Industry Districts

The Commerce and Industry (C&I) Districts are characterized by predominant economic activities, employment concentration, business density, and other spatial characteristics. This classification aggregates small zip code based units into 10 large districts encompassing the entire city of San Francisco. Each district is defined by one or more postal zip codes because a zip code is traditionally the smallest geographical unit for which economic data are available. The district boundaries are as close as possible to census tract boundaries, so that data available from the census can be meaningfully compared to the economic data. The C&I district boundaries are shown on Map 1.1.

Commerce and Industry Districts are characterized by a concentration or specialization in one type of Land Use Activity or similar neighborhood commercial activities.



Commerce and Industry Districts San Francisco



- The **Mission** and **North Beach** districts are characterized by intense local retail activities and have very defined identities for the local and visitor population.
- The **Bayview** district houses a high concentration of PDR activities and shows a low density in terms of population, employment, and establishments.
- The **Civic Center** is defined by its high concentration of institutional and government activities.
- The **Van Ness** district runs along a commercial corridor surrounded by mid- to high-density residential buildings.

- The **North Central** district concentrates a great proportion of institutional activities, mainly health related, and is a transitional area between downtown and the more peripheral residential area to the west.
- The **South of Market** district contains a combination of office and PDR activities, located between the Financial District and Bayview.
- The **Financial District** covers the densest area with the highest concentration of employment and establishments.
- The **Southwest** and **Northwest** districts are predominantly residential, with a very low business density.

In addition to the above ten zip code-based districts, there is an Unclassified category. This category represents home-based business establishments and organizations, particularly care-givers. These groups do not register a physical address with the State and thus cannot be assigned to specific geographic districts. The Unclassified C&I district also includes San Francisco International Airport, Treasure Island, and Yerba Buena Island.

The Inventory also provides information on geographic areas other than Commerce and Industry Districts. These areas are referred to as Plan Areas and are used exclusively in Chapter 6. The neighborhood district boundaries tend to follow more homogeneous economic patterns than the zip code-based Commerce and Industry districts.

Land Use Categories

This classification facilitates the use of economic information for studies related to land use policy development. It is useful in the evaluation of employment, establishments and transactions within their physical parameters. It matches the type of economic activity with a corresponding type of building structure as well as the prevalent land use pattern. This classification is based only on San Francisco's business activities and land use pattern. Its application to any environment outside of the city may require some adjustments.

The six Land Use categories used in this Inventory are: Office, Retail, PDR, Hotel, Cultural/ Institutional/ Educational (CIE), and Residential. The Residential land use category is addressed only in Chapter 6 in the context of building permits and land use by plan areas. The definitions of each of these categories are as follows:

- **Office** activity includes professional services such as administration, legal services, architecture, engineering, real estate, computer services, research and development activities, and government administrative functions. Three types of spaces are considered: primary offices, which mainly include headquarters and large firms; secondary offices, which include small professional offices and services, and walk-in customer facilities such as banking.
- **Retail** activity includes large- and small-scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, auto repair shops, and beauty shops.
- **Production/Distribution/Repair (PDR)** activity includes establishments related to processing and movement of goods and provision of city-wide infrastructure. It includes manufacturing, wholesale, construction, transportation, information, and utilities. Most of these activities take place in buildings with large, open floor plates—structures that can house machinery and PDR equipment. Some of the food manufacturing and printing activities, however, are located in small shops due to the small scale of production, small machinery required, and/or reliance on the retail component of their business.
- **Hotel** activity is defined as a separate Land Use Category because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, or bed and breakfast.

- **Cultural/Institutional/Educational (CIE)** activities cover the social spectrum of economy by including entertainment and artistic activities as well as health and educational services. This category covers the widest variety of space types from large establishments (hospitals, universities, schools, museums) to small studios or businesses (nightclubs, art studios). These activities are more geographically disparate than the other categories. They are often specialized facilities, many of which are non-profit organizations.

Industry Groups

This classification facilitates collection and tabulation of data related to individual business establishments. It aggregates all business establishments into specific Industry groups according to similarity of their product or process used in production related activities. These Industry groups are based on two pre-established industry classification systems—*Standard Industry Classification (SIC)* system and *North American Industry Classification System (NAICS)*. These systems were developed by the United States Department of Commerce and adopted by the California Employment Development Department (EDD) to classify all business establishments and organizations. NAICS is a new system, which was released in 1997 and last revised in 2007. It replaces the SIC system used before 2001. Both systems are discussed below.

- **The SIC system** classifies all business establishments based on the kind of product or service they provide. It is a four-digit coding system. The first two digits of the code represent sectors to represent major categories of economic activities, first three digits represent industry groups, and four digits correspond to specific industries.
- **The NAICS** classifies all business establishments based on the similarity in the process used to produce goods or services. NAICS is a six-digit coding system. Under NAICS, the first two digits of the code are designated as sector to represent general categories of economic activities. The first three digits are designated as sub-sector to represent major category of economic activities. The first four digits represent industry group, while the five and six digit classifications correspond to specific industries.

Some of the data in the Inventory are presented by Industry Group using the North American Industry Classification System (NAICS), which includes these industry sectors: Farm, Natural Resources, Mining and Construction, Manufacturing, Transportation, Utilities, Information, Wholesale Trade, Retail Trade, Financial Activities, Professional and Business Services, Educational and Health Services, Leisure and Hospitality, Other Services, and Government. Other Services includes repair and maintenance, personal services, religious and grant making services, and services related to the operation of a private household. Government includes all civilian employees of federal, state, and local government, regardless of the activity in which employees are engaged.

Industrial Classification Systems: NAICS and SIC

NAICS organizes all economic activity into 20 broad sectors as opposed to 10 sectors under the SIC system (Table 1.1). The purpose for this broader categorization is to clearly establish and distinguish each industry sector from another. NAICS also includes 350 new industries including several new high-tech and services related industries which were not appropriately defined and recognized in the SIC system.

For the purposes of this Inventory, SIC and NAICS classifications are aggregated into industry groups and land use categories. Table 1.2 shows major industry groups related to each land use category and their corresponding SIC and NAICS groupings.

Data from 2001 to 2008 in Chapters 3 to 5 of this Inventory were prepared using business and employment data organized by NAICS. Data from 1999-2000 in this Inventory were prepared using business and employment data organized by SIC code. Several adjustments have been made in the data from 1999-2000 so that data in these years are comparable with 2001-2008 data to the extent possible. Even after these adjustments, however, differences in a few industry groups in 1999-2000 are significant from the corresponding data groups in proceeding years. Key industry groups and land use categories with revisions in their data structure are listed in Table 1.3.

TABLE 1.1 MAJOR INDUSTRY CLASSIFICATION CATEGORIES

NAICS (Used since 2001)			SIC (Used through 2000)		
S.N.	Code	Sectors	S.N.	Code	Divisions
1	11	Agriculture, Forestry, Fishing and Hunting	1	00-09	Agriculture, Forestry, and Fishing
2	21	Mining	2	10-14	Mining
3	23	Construction	3	15-17	Construction
4	31-33	Manufacturing	4	20-39	Manufacturing
5	48-49	Transportation and Warehousing	5	40-49	Transportation, Communications, and Utilities
6	22	Utilities			
7	51	Information			
8	42	Wholesale Trade	6	50-51	Wholesale Trade
9	44-45	Retail Trade	7	52-59	Retail Trade
10	52	Finance and Insurance	8	60-67	Finance, Insurance, and Real Estate
11	53	Real Estate and Rental and Leasing			
12	54	Professional, Scientific, and Technical Services	9	70-89	Service Industries (includes business, engineering, hotels, motels, repair services, entertainment, recreation, health, education, social, and other services related industries)
13	55	Management of Companies and Enterprises			
14	56	Administrative and Support, Waste Management and Remediation Services			
15	61	Education Services			
16	62	Health Care and Social Assistance			
17	71	Arts, Entertainment, and Recreation			
18	72	Accommodation and Food Services			
19	81	Other Services (except Public Administration)			
20	92	Public Administration	10	90-98	Public Administration

Note: S.N. = Sector Number

Sources: Executive Office of The President; Office of the Management and Budget; San Francisco Planning Department

TABLE 1.2 CLASSIFICATION BY LAND USE CATEGORIES AND INDUSTRY GROUPS

Land Use Category	NAICS (Used since 2001)		SIC SYSTEM (Used through 2000)		
	Industry Group	NAICS Code	Industry Group	Industry Subsector	SIC Code
Office Examples: Headquarter offices, professional services, branch banks	Agriculture	111-115	Agriculture	Agriculture	00-06
		211-213		Mining	10-14
	Finance	522-523	Finance	Finance	60-62
	Insurance	524-525	Insurance	Insurance	63-64
	Real Estate	531, 533	Real Estate	Real estate	65
	Office Services	516	Office Services	Transportation services	47
		518		Holding and investment offices	67
		519		Engineering & management	87
		541		Business services	73
		551		Miscellaneous	89
		561		Administrative & support services	
			Legal Services	Legal services	81
	Public Administration	921-928	Public Administration	Public administration	91.93.95-97
Retail Examples: Stores, restaurants, bars, commercial parking lots	General Merchandise	452	General Merchandise	General merchandise stores	53
	Food Stores	445	Food Stores	Food stores	54
	Apparel Stores	448	Apparel Stores	Apparel and accessory stores	56
	Eating & Drinking Places	722	Restaurants	Eating and drinking places	58
	Other Retail Stores	441, 447	Other Retail Stores	Building materials & garden supplies	52
		442		Auto dealers & service stations	55
		443,446,451		Furniture & home furnishings stores	57
		453-454		Miscellaneous retail	59
		532		Rental & leasing services	
	Personal & Repair	812	Services and Repair	Personal services	72
				Repair, services, & parking	75-76
Production/ Distribution/ Repair (PDR) Examples: Warehouses, factories, workshops showrooms, port, television, telegraph, cable, satellite	Construction	236-238	Construction	Construction	15-17
	Transportation and Warehousing	488	Transportation and Warehousing	Railroads, line-haul operating	40
		485, 487		Local & interurban transit	41
		484, 492-493		Freight transportation & warehousing	42
		491		U.S. Postal Service	43
		481, 483		Water and air transportation	44-45
		486		Pipeline transportation	46
	Utilities	221	Public Utilities	Electric, gas, & sanitary services	49
		562			
	Information	515	Communications	Radiotelephone broadcasting	48
		517		Radiotelephone communication	
	Wholesale	423-425	Wholesale	Wholesale	50-51
	Food Manufacturing	311-312	Food Manufacturing	Food manufacturing	20
	Apparel Manufacturing	313-315	Apparel Manufacturing	Apparel & textile manufacturing	22-23
	Printing and Publishing	323, 311	Printing and Publishing	Printing and publishing	27
	Other Manufacturing	321-322, 337	Other Manufacturing	Fishing	09
		324-325		Lumber, furniture & fixtures, paper	24-26
		316, 326-327		Chemicals & petroleum production	28-29
		331-333		Rubber, leather, stone/clay/glass/concrete	30-32
		334-335		Metal, industrial machinery & equipment	33-35
	Repair Services	336, 811		Electrics & electronic manufacturing	36
	Transp Equipment, Building Supplies	339, 444		Transportation equipment	37
	Film & Sound Recording	512		Instruments, miscellaneous	38-39
Hotel	Accommodation	721	Hotel	Hotel, motel, campgrounds	70
	Art and Recreation	711	Film & Recreation	Motion picture production & recording	78
	Performing arts, amusement parks	713		Art, amusement and recreation	79
	Educational Services	611	Educational Services	Educational services	82
	Health Care	621-623	Health Services	Health services	80
	Social Assistance	624	Social Services	Social services	83
	Other CIE Services	712	Other CIE Services	Museums, botanical & zoological gardens	84
		813		Membership organizations	86
Cultural/ Institutional/ Educational (CIE) Examples: Theaters, museums, hospitals, schools, libraries, churches	*	*	Public Administration	Public administration	92, 94
				Private households	88
				Generally those, which are deemed confidential	99
Other	Private households	814	Private households	Private households	88
	Unclassified Establishments	999	Non-Classifiable Establishments		

Sources: Executive Office of The President; Office of the Management and Budget; San Francisco Planning Department

TABLE 1.3 CHANGES IN LAND USE CATEGORIES AND INDUSTRY GROUPS IN 2001

2001		SIC & NAICS Categories	NAICS Code	SIC Code	1999-2000	
Land Use Category	Industry Group				Land Use Category	Industry Group
Office	Office Services	Veterinary Services For Livestock	54194	741	Office	Agriculture
Office	Office Services	Veterinary Services for Animal Specialties	54194	742	Office	Agriculture
Office	Office Services	Horticulture Consulting	54169	781	Office	Agriculture
Office	Office Services	Landscape/Architectural Services	54132	781	Office	Agriculture
Office	Office Services	Lawn and Garden Services	56173	782	Office	Agriculture
Office	Office Services	Ornamental Shrub and Tree Services	56173	783	Office	Agriculture
Office	Office Services	Carpet and Upholstery Cleaning	56174	7217	Retail	Personal & Repair
Office	Office Services	Tax Return Preparation Services	541213	7291	Retail	Personal & Repair
Office	Office Services	Babysitting Bureaus	56131	7299	Retail	Personal & Repair
Office	Office Services	Internet Publishing and Broadcasting	516110	2711	PDR	Printing & Publishing
Office	Office Services	Advertising Specialties Goods Distributors	54189	5199	PDR	Wholesale
Office	Office Services	Librarians and Archivists	519120	8231	CIE	Educational Services
Office	Office Services	Film Archives	519120	7829	CIE	Art & Recreation
Office	Office Services	Travel Motor Clubs	561599	8699	CIE	Other CIE Services
Office	Public Administration	Parole Offices and Probation Offices	92215	8322	CIE	Social Assistance
Office	Public Administration	American Indian and Alaska Native Tribal Governments	92115	8641	CIE	Other CIE Services
Retail	Personal & Repair	Pet Care Services	81291	752	Office	Agriculture
Retail	Other Retail Stores	Air, Rail, & Water Transportation Equipment Rental	532411	4499	PDR	Transportation
Retail	Other Retail Stores	Motor Vehicle Supplies, Used and New Parts, Tires and Tubes	44131	5013	PDR	Wholesale
Retail	Other Retail Stores	Furniture	44211	5021	PDR	Wholesale
Retail	Other Retail Stores	Floor Covering Stores	44221	5023	PDR	Wholesale
Retail	Other Retail Stores	Brick, Stone and Related Construction Materials	44419	5032	PDR	Wholesale
Retail	Other Retail Stores	Office Equipment	45321	5044	PDR	Wholesale
Retail	Other Retail Stores	Computers & Computer Peripheral Equip. & Software	44312	5045	PDR	Wholesale
Retail	Other Retail Stores	Medical, Dental, and Hospital Equipment and Supplies	446199	5047	PDR	Wholesale
Retail	Other Retail Stores	Professional Equipment and Supplies	45321	5049	PDR	Wholesale
Retail	Other Retail Stores	Electrical Apparatus, Equip. Wiring Supplies, Construction Materials	44419	5063	PDR	Wholesale
Retail	Other Retail Stores	Hardware, Plumbing & Heating Equipment and Supplies	44413	5072	PDR	Wholesale
Retail	Other Retail Stores	Farm and Garden Machinery and Equipment	44421	5083	PDR	Wholesale
Retail	Other Retail Stores	Beauty and Barber Shop Equipment and Supplies	44612	5087	PDR	Wholesale
Retail	Other Retail Stores	Stationery and Office Supplies	45321	5112	PDR	Wholesale
Retail	Other Retail Stores	Heating Oil, Liquefied Petroleum Gas	45431	5171	PDR	Wholesale
Retail	Other Retail Stores	Lawn, Garden, Flowers, Nursery Stock, & Florists' Supplies	44422	5191	PDR	Wholesale
Retail	Other Retail Stores	Wardrobe Rental (Motion Pictures)	53292	7819	CIE	Art & Recreation
Retail	Other Retail Stores	Video Tape and Disc Rental	53293	7841	CIE	Art & Recreation
Retail	Other Retail Stores	Recreational Goods Rental	53292	7999	CIE	Art & Recreation
PDR	Food Manufacturing	Custom Grain Grinding	311119	723	Office	Agriculture
PDR	Food Manufacturing	Custom Slaughtering	311611	751	Office	Agriculture
PDR	Food manufacturing	Meat Processed from Carcasses	311612	5147	PDR	Wholesale
PDR	Food manufacturing	Bottling Mineral or Spring Water	312112	5149	PDR	Wholesale
PDR	Apparel Manufacturing	Custom Tailors and Seamstresses	315	5699	Retail	Apparel Stores
PDR	Apparel manufacturing	Converters, Broadwoven Piece Goods Fabric	31331	5131	PDR	Wholesale
PDR	Printing & Publishing	Printing and Embossing on Fabric Articles	323113	2396	PDR	Apparel Manufacturing
PDR	Other Manufacturing	Mops, Floor and Dust Manufacturing	339994	2392	PDR	Apparel Manufacturing
PDR	Other Manufacturing	Textile Automotive Trimmings, Seat Belts, Seat & Tire Covers	33636	2396	PDR	Apparel Manufacturing
PDR	Other Manufacturing	Motion Picture and Video Tape Production Industries	51211	7812	CIE	Art & Recreation
PDR	Other Manufacturing	Commercial Distribution Film Libraries	51212	7829	CIE	Art & Recreation
PDR	Other Manufacturing	Motion Picture Theaters	51213	7832	CIE	Art & Recreation
PDR	Other Manufacturing	Television and Post-Production Services	512191	7819	CIE	Art & Recreation
PDR	Other Manufacturing	Booking Agencies	512199	7829	CIE	Art & Recreation
CIE	Health Care	Homes for the Elderly, Other Residential Care	623312	8361	CIE	Social Assistance
CIE	Health Care	Mental Health and Substance Abuse Facilities	62322	8361	CIE	Social Assistance
CIE	Educational Services	Beauty and Cosmetology Schools	611511	7231	Retail	Personal & Repair
CIE	Educational Services	Barber Colleges	611511	7241	Retail	Personal & Repair
CIE	Other CIE Services	Education, Religious, and Charitable Trusts	81399	6531	Office	Office Services
CIE	Other CIE Services	Condominium Associations	813211	6732	Office	Real Estate
CIE	Other CIE Services	Caverns and Miscellaneous Commercial Parks	71219	7999	CIE	Art & Recreation
CIE	Other CIE Services	Voluntary Health Organizations	813212	8399	CIE	Social Assistance
CIE	Other CIE Services	Grantmaking, Giving, & Human Rights organizations	813219	8399	CIE	Social Assistance
CIE	Other CIE Services	Social Advocacy, Environment, Conservation, Wildlife Organizations	81331	8399	CIE	Social Assistance

Note: CIE = Cultural/Institutional/Educational Sources: Executive Office of the President; Office of the Management and Budget, San Francisco Planning Department

2.0 REGIONAL OVERVIEW

San Francisco has diverse linkages to the region, as well as to the state, national, and global economy. This chapter supplies basic demographic and economic information about the San Francisco Bay Area's nine counties. This information gives an understanding of San Francisco's economic base within a regional and historical context. The period of time covered ranges from 1999 to 2008.

The nine counties in San Francisco Bay Area are: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma. Map 2.1 shows the location of these counties, which have been grouped into four sub-regions: North Bay, East Bay, South Bay, and San Francisco. These sub-regions were initially formed in 1985 on the basis of observed travel patterns of commuters into San Francisco and availability of employment information. Although travel patterns have evolved since the initial observations, these sub-regions have been retained in order to maintain the consistency of the data structure in this chapter. The North Bay includes Marin, Sonoma, Napa, and Solano counties. The East Bay includes Contra Costa and Alameda counties. The South Bay includes Santa Clara and San Mateo counties.

The regional subdivision allows comparisons between San Francisco, North Bay, East Bay, and South Bay areas that represent the labor force base for San Francisco and the region. When reviewing the tables in this chapter, it is important to note that the Bay Area covers 7,041 square miles in total. The North Bay represents 53 percent of that total, the East

Bay 21 percent, the South Bay 25 percent, and San Francisco less than one percent of land area in the region. Population densities in San Francisco are by far the highest in the Bay Area.

This chapter presents two sets of tables and graphs. The first set reports population, labor force, employment, and unemployment by sub-region. These concepts are described below. This data is focused on the residents of each county. For context, unemployment data is also provided for California and the United States as a whole. The second set describes regional employment for each sub-region by industry groups from 1999 to 2008. This data is focused on those that work in each county, independent of where they live.

Each economic indicator is reported in absolute numbers, annual percentage distribution, and percentage change over time. Unemployment figures are presented in terms of average annual rates.

- **Population** is defined as the total number of people who live in a specific area, such as a particular county or city. Population data from 1999 to 2008 come from the California State Department of Finance (DoF). These data are based on the 1990 and 2000 Census numbers with yearly updates which take into account city/county surveys of building permits, construction activity, and overall housing stock; tallying of administrative records from local, state, and federal agencies including driver's



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license data, school registration, and birth and death certificate records; and tracking the status of military bases. The DoF population estimates are generally 3% to 5% higher than that of the Census Bureau's estimates.

- Labor Force** consists of persons who are either working or looking for work, excluding members of the armed forces. Labor force data are based on place of residence. For example, a worker who lives in the East Bay is part of the East Bay labor force, no matter where he or she is employed. Labor force data are obtained from the California Employment Development Department (EDD).
- Employment**, as used in this inventory and defined by EDD, includes persons who were either at work or temporarily absent from work due to illness, vacation, strike, or other personal reasons. Employment data are collected by place of work. Someone holding a job in San Francisco is part of the San Francisco employment pool no matter where he or she lives. These data do not include self-employed, unpaid family workers, domestics, volunteers, or persons involved in trade disputes.

- **Unemployment** is defined as civilians 16 years and older, not at work, who were actively looking for work during the last four weeks, and were available to accept a job or who were waiting to be called back to jobs from which they had been laid off. Civilian unemployment data are based on place of residence. The unemployment data are from EDD, the United States Department of Commerce, and U.S. Census Bureau.

Employment data reported by industry group are based on EDD data. These data are organized by using the North American Industry Classification System (NAICS), as discussed in Chapter 1.

San Francisco's Residents in a Regional Context

- *Table 2.1.1 Bay Area Population by Sub-Region, 1999-2008* — According to the Department of Finance estimates, San Francisco has grown to some 845,600 people in 2008, an addition of 21,100 people from 2007 or 2.6% growth. The rest of the Bay Area continues to grow with the region adding 74,600 new residents. San Francisco led the region in the rate of growth over the last two years.
- *Table 2.1.2 Bay Area Labor Force by Sub-Region, 1999-2008* — The number of San Francisco residents in the labor force increased for the third year in a row after five consecutive years of decline. Some 17,000 San Franciscans joined the labor force in 2008, a gain of almost 4%. Regionally, both San Francisco and the South Bay are growing at the fastest rates.
- *Table 2.1.3 Bay Area Employed Residents by Sub-Region, 1999-2008* — Bay Area employed residents continued to increase with the addition of 17,700 in 2008, about one-third the rate of the previous two years. After four consecutive years of decline, the number of employed Bay Area residents picked up in 2005; however, the region still lags the 2000 high by almost 4%.
- *Table 2.1.4 Bay Area Unemployed Residents by Sub-Region, 1999-2008* — Unemployment rate in San Francisco rose 0.1% to 4.2%, the first increase since 2002. Increases were greater in the other Bay Area sub-regions. Regionwide, the unemployment rate increased to 4.6% as 13,000 more people were unemployed.

People Who Work in San Francisco in a Regional Context

Note: At the time of publication of this Inventory, EDD had not released 2008 county-level data for employment by industry group. As a result, the data in the following four tables is only reported for 1998 through 2007. Data for 2008 will be included in next year's Commerce and Industry Inventory.

- *Tables 2.2.1 Bay Area Employment by Industry Group, 1998-2007* — Regionwide, Manufacturing jobs have been declining since 2000. Educational and Health Services jobs, on the other hand, have been growing since 2000. The Professional and Business Services group has been recovering slowing since 2003.
- *Tables 2.2.2 Bay Area Employment by Industry Group and Sub-Region, 1998-2007 – Number of Jobs* — San Francisco's share of the region's employment has remained around 16% for at least ten years.
- *Tables 2.2.3 Bay Area Employment by Industry Group and Sub-Region, 1998-2007 – Annual Percentage Distribution* — Relative to the region, there were no substantial shifts in the percentage distribution of industries.
- *Tables 2.2.4 Bay Area Employment by Industry Group and Sub-Region, 1998-2007 – Annual Percentage Change* — Except for "Farm" employment, there were no substantial shifts in the percentage change of industries. San Francisco's Manufacturing employment remained constant in 2007 after nine years of decline. The roller coaster trend in "Farm" employment, which represents a minuscule portion of San Francisco employment (about 0.03%), can be attributed to industry reporting error.

TABLE 2.1.1 BAY AREA POPULATION BY SUB-REGION, 1999-2008

This table presents the number of residents in each Bay Area sub-region for the last ten years, as well as the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Population trends are shown in Figure 2.1.1 below.

Population by Sub-Region (000s)

Sub-Region	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Bay	1,206.3	1,225.8	1,248.8	1,254.7	1,271.0	1,275.6	1,290.6	1,298.5	1,305.3	1,309.5
East Bay	2,349.7	2,384.3	2,451.2	2,468.2	2,501.9	2,505.9	2,539.7	2,568.5	2,594.7	2,617.1
South Bay	2,438.2	2,466.7	2,443.8	2,436.6	2,443.8	2,459.7	2,497.4	2,541.6	2,576.5	2,603.5
San Francisco	790.5	801.4	793.7	793.6	792.0	795.0	798.7	808.8	824.5	845.6
TOTAL	6,540.5	6,853.8	6,918.8	6,932.7	6,968.7	7,036.2	7,126.3	7,217.4	7,301.1	7,375.7

Annual % Distribution	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Bay	18.4	17.9	18.0	18.1	18.2	18.1	18.1	18.0	17.9	17.8
East Bay	35.9	34.8	35.4	35.6	35.9	35.6	35.6	35.6	35.5	35.5
South Bay	37.3	36.0	35.3	35.1	35.1	35.0	35.0	35.2	35.3	35.3
San Francisco	12.1	11.7	11.5	11.4	11.4	11.3	11.2	11.2	11.3	11.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
North Bay	1.6	1.9	0.5	1.3	0.4	1.2	0.6	0.5	0.3
East Bay	1.5	2.8	0.7	1.4	0.2	1.3	1.1	1.0	0.9
South Bay	1.2	-0.9	-0.3	0.3	0.7	1.5	1.8	1.4	1.0
San Francisco	1.4	-1.0	-0.0	-0.2	0.4	0.5	1.3	1.9	2.6
TOTAL	4.8	0.9	0.2	0.5	1.0	1.3	1.3	1.2	1.0

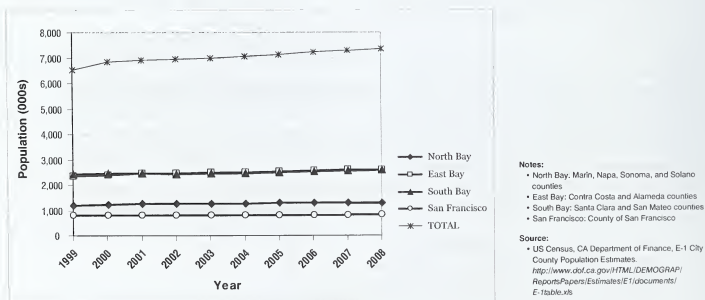
FIGURE 2.1.1 BAY AREA POPULATION BY SUB-REGION, 1999-2008

TABLE 2.1.2 BAY AREA LABOR FORCE BY SUB-REGION, 1999-2008

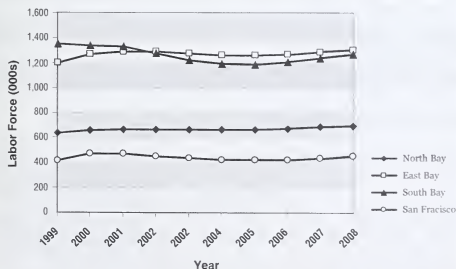
This table presents the number of residents in the labor force in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Labor force trends are shown in Figure 2.1.2 below.

Residents in the Labor Force by Sub-Region (000s)

Sub-Region	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Bay	634.7	660.2	665.3	667.4	664.7	665.6	668.3	674.9	684.3	690.4
East Bay	1,201.3	1,269.6	1,286.7	1,288.0	1,272.7	1,259.2	1,259.7	1,265.2	1,281.5	1,295.7
South Bay	1,354.0	1,337.7	1,332.5	1,271.0	1,221.3	1,193.5	1,187.5	1,204.9	1,234.7	1,264.3
San Francisco	417.9	472.6	469.4	450.4	433.0	422.3	420.5	422.5	433.3	450.4
TOTAL	3,607.9	3,740.1	3,753.9	3,676.8	3,591.7	3,540.6	3,536.0	3,567.5	3,633.8	3,633.8

Annual % Distribution	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Bay	17.6	17.7	17.7	18.2	18.5	18.8	18.9	18.9	18.8	18.7
East Bay	33.3	33.9	34.3	35.0	35.4	35.6	35.6	35.5	35.3	35.0
South Bay	37.5	35.8	35.5	34.6	34.0	33.7	33.6	33.8	34.0	34.2
San Francisco	11.6	12.6	12.5	12.2	12.1	11.9	11.9	11.8	11.9	12.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
North Bay	4.0	0.8	0.3	-0.4	0.1	0.4	1.0	1.4	0.9
East Bay	5.7	1.3	0.1	-1.2	-1.1	0.0	0.4	1.3	1.1
South Bay	-1.2	-0.4	-4.6	-3.9	-2.3	-0.5	1.5	2.5	2.4
San Francisco	13.1	-0.7	-4.0	-3.9	-2.5	-0.4	0.5	2.6	3.9
TOTAL	3.7	0.4	-2.1	-2.3	-1.4	-0.1	0.9	1.9	1.8

FIGURE 2.1.2 BAY AREA LABOR FORCE BY SUB-REGION, 1999-2008

Notes:

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: County of San Francisco

Source:

• CA Employment Development Department, annual averages (not seasonally adjusted)
www.labormarketing.edd.ca.gov/?PAGEID=131

TABLE 2.1.3 BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 1999-2008

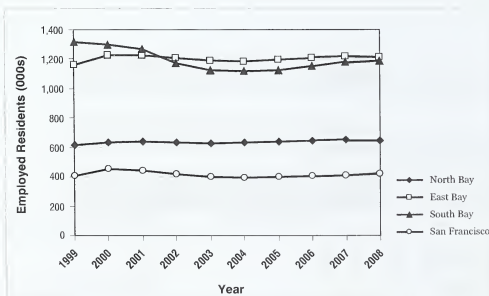
This table presents the number of employed residents in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Employment trends are shown in Figure 2.1.3 below.

Employed Residents by Sub-Region (000s)

Sub-Region	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Bay	614.4	636.4	639.4	632.6	627.7	631.4	637.6	646.7	653.2	650.3
East Bay	1,161.5	1,224.0	1,228.8	1,206.2	1,188.4	1,186.4	1,196.2	1,209.7	1,220.6	1,215.5
South Bay	1,316.9	1,296.9	1,269.2	1,173.5	1,127.1	1,120.5	1,126.8	1,153.7	1,179.7	1,193.3
San Francisco	405.1	456.5	445.4	418.7	403.2	397.1	399.0	404.7	414.6	426.7
TOTAL	3,497.9	3,613.8	3,582.8	3,431.0	3,346.4	3,335.4	3,359.6	3,414.8	3,468.1	3,485.8

Annual % Distribution	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Bay	17.6	17.6	17.8	18.4	18.8	18.9	19.0	18.9	18.8	18.7
East Bay	33.2	33.9	34.3	35.2	35.5	35.6	35.6	35.4	35.2	34.9
South Bay	37.6	35.9	35.4	34.2	33.7	33.6	33.5	33.8	34.0	34.2
San Francisco	11.6	12.6	12.4	12.2	12.0	11.9	11.9	11.9	12.0	12.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
North Bay	3.6	0.5	-1.1	-0.8	0.6	1.0	1.4	1.0	-0.4
East Bay	5.4	0.4	-1.8	-1.5	-0.2	0.8	1.1	0.9	-0.4
South Bay	-1.5	-2.1	-7.5	-4.0	-0.6	0.6	2.4	2.3	1.2
San Francisco	12.7	-2.4	-6.0	-3.7	-1.5	0.5	1.4	2.4	2.9
TOTAL	3.3	-0.9	-4.2	-2.5	-0.3	0.7	1.6	1.6	0.5

FIGURE 2.1.3 BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 1999-2008**Notes:**

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: County of San Francisco

Source:

- CA Employment Development Department, annual averages (not seasonally adjusted), www.isbormarketinginfo.edd.ca.gov/?PAGEID=131

TABLE 2.1.4 BAY AREA UNEMPLOYMENT BY SUB-REGION, 1999-2008

This table presents the number of unemployed residents in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Finally, this table also includes unemployment rates over the last ten years for each sub-region, as well as for California and the United States to provide context. Unemployment rate trends are shown in Figure 2.1.4 below.

Unemployment by Sub-Region (000s)

Sub-Region	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Bay	20.1	23.8	25.9	34.8	37.0	34.2	30.7	28.2	31.1	39.9
East Bay	39.7	45.6	57.9	81.8	84.3	72.8	63.5	55.5	60.9	80.1
South Bay	37.0	40.8	63.3	97.5	94.2	73.0	60.7	51.2	55.0	70.9
San Francisco	12.8	16.1	24.0	31.7	29.8	25.2	21.5	17.8	18.7	23.7
TOTAL	109.6	126.3	171.1	245.8	245.3	205.2	176.4	152.7	165.7	214.6

Annual % Distribution	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Bay	18.3	18.8	15.1	14.2	15.1	16.7	17.4	18.5	18.8	18.6
East Bay	36.2	36.1	33.8	33.3	34.4	35.5	36.0	36.3	36.8	37.3
South Bay	33.8	32.3	37.0	39.7	38.4	35.6	34.4	33.5	33.2	33.0
San Francisco	11.7	12.7	14.0	12.9	12.1	12.3	12.2	11.7	11.3	11.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
North Bay	18.4	8.8	34.4	6.3	-7.6	-10.2	-8.1	10.3	28.3
East Bay	14.9	27.0	41.3	3.1	-13.6	-12.8	-12.6	9.7	31.5
South Bay	10.3	55.1	54.0	-3.4	-22.5	-16.8	-15.7	7.4	28.9
San Francisco	25.8	49.1	32.1	-6.0	-15.4	-14.7	-17.2	5.1	26.7
TOTAL	15.2	35.5	43.7	-0.2	-16.3	-14.0	-13.4	8.5	29.5

Average Annual Rate	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
North Bay	3.2	3.6	3.9	5.2	5.6	5.1	4.6	4.2	4.5	5.8
East Bay	3.3	3.6	4.5	6.4	6.6	5.8	5.0	4.4	4.8	6.2
South Bay	2.7	3.1	4.8	7.7	7.7	6.1	5.1	4.2	4.5	5.6
San Francisco	3.1	3.4	5.1	7.0	6.9	6.0	5.1	4.2	4.3	5.3
Average	3.0	3.4	4.6	6.7	6.8	5.8	5.0	4.3	4.6	5.8

Average Annual Rate	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
California	5.2	4.9	5.3	6.7	6.7	6.2	5.4	4.9	5.4	7.2
United States	4.2	4.0	4.8	5.8	6	5.5	5.1	4.6	4.6	5.8

Notes:

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: County of San Francisco

Sources:

- CA Employment Development Department, annual averages (not seasonally adjusted). www.labormarketinfo.edd.ca.gov/?PAGEID=131
- US Bureau of Labor Statistics. http://www.bls.gov/chs/prev_yrs.htm

FIGURE 2.1.4 UNEMPLOYMENT RATE BY SUB-REGION, 1999-2008

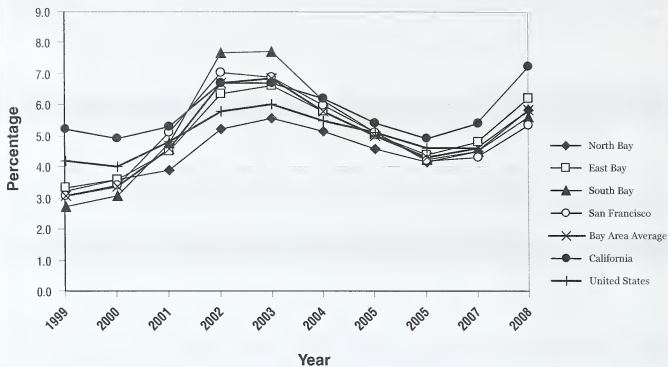


TABLE 2.2.1 BAY AREA EMPLOYMENT BY INDUSTRY GROUP, 1998-2007

This table presents information about those who work in the Bay Area. It conveys the number of people working in each industry group. The breakdown for each Bay Area sub-region is presented in Tables 2.2.2 - 2.2.4. All tables utilize NAICS industrial categories for the entire period of analysis.

Number of Jobs (000s)

Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Farm	26.1	25.9	27.0	28.1	27.2	25.8	25.4	22.5	20.2	20.6
Natural Resources, Mining & Construction	160.2	177.1	191.0	198.0	186.8	191.1	187.6	194.2	196.0	194.7
Manufacturing	479.0	465.4	486.9	468.3	409.3	370.8	361.9	353.8	352.0	345.0
Trade, Transportation & Utilities	593.1	604.0	617.6	612.3	584.3	566.4	558.4	562.5	564.1	571.3
Information	110.0	122.2	151.7	146.8	127.0	117.0	114.0	112.4	112.5	113.3
Financial Activities	194.4	197.8	198.9	213.3	211.4	211.5	209.2	213.3	213.4	206.1
Professional & Business Services	588.0	621.6	670.9	619.8	541.5	517.0	518.1	529.7	549.8	572.4
Educational & Health Services	328.6	335.6	334.9	344.0	349.6	355.6	358.6	362.3	373.1	380.0
Leisure & Hospitality	283.9	291.1	299.0	306.3	302.2	302.9	306.7	312.3	322.0	329.9
Other Services	109.1	109.1	111.1	114.8	115.2	112.8	111.2	110.4	109.8	111.5
Government	441.7	454.0	468.0	471.1	484.5	476.6	467.4	471.1	473.2	485.8
TOTAL	3314.1	3,403.8	3,557.0	3,522.8	3,339.0	3,247.5	3,218.5	3,244.5	3,286.1	3,330.6

Annual Percentage Distribution

Industry Group	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Farm	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.7	0.6	0.6
Natural Resources, Mining & Construction	4.8	5.2	5.4	5.6	5.6	5.9	5.8	6.0	6.0	5.8
Manufacturing	14.5	13.7	13.7	13.3	12.3	11.4	11.2	10.9	10.7	10.4
Trade, Transportation & Utilities	17.9	17.7	17.4	17.4	17.5	17.4	17.3	17.3	17.2	17.2
Information	3.3	3.6	4.3	4.2	3.8	3.6	3.5	3.5	3.4	3.4
Financial Activities	5.9	5.8	5.6	6.1	6.3	6.5	6.5	6.6	6.5	6.2
Professional & Business Services	17.7	18.3	18.9	17.6	16.2	15.9	16.1	16.3	16.7	17.2
Educational & Health Services	9.9	9.9	9.4	9.8	10.5	10.9	11.1	11.2	11.4	11.4
Leisure & Hospitality	8.6	8.6	8.4	8.7	9.1	9.3	9.5	9.6	9.8	9.9
Other Services	3.3	3.2	3.1	3.3	3.5	3.5	3.5	3.4	3.3	3.3
Government	13.3	13.3	13.2	13.4	14.5	14.7	14.5	14.5	14.4	14.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Farm	-0.8	4.2	4.1	-3.2	-5.1	-1.6	-11.4	-10.2	2.0
Natural Resources, Mining & Construction	10.5	7.8	3.7	-5.7	2.3	-1.8	3.5	0.9	-0.7
Manufacturing	-2.8	4.6	-3.8	-12.6	-9.4	-2.4	-2.2	-0.5	-2.0
Trade, Transportation & Utilities	1.8	2.3	-0.9	-4.6	-3.1	-1.4	0.7	0.3	1.3
Information	11.1	24.1	-3.2	-13.5	-7.9	-2.6	-1.4	0.1	0.7
Financial Activities	1.7	0.6	7.2	-0.9	0.0	-1.1	2.0	0.0	-3.4
Professional & Business Services	5.7	7.9	-7.6	-12.6	-4.5	0.2	2.2	3.8	4.1
Educational & Health Services	2.1	-0.2	2.7	1.6	1.7	0.8	1.0	3.0	1.8
Leisure & Hospitality	2.5	2.7	2.4	-1.3	0.2	1.3	1.8	3.1	2.5
Other Services	0.0	1.8	3.3	0.3	-2.1	-1.4	-0.7	-0.5	1.5
Government	2.8	3.1	0.7	2.8	-1.6	-1.9	0.8	0.4	2.7
TOTAL	2.7	4.5	-1.0	-5.2	-2.7	-0.9	0.8	1.3	1.4

Source:

• California Employment Development Department, Industry Employment & Labor Force - by Annual Average; March Benchmark.

<http://www.labormarketinfo.edd.ca.gov/?PAGEID=371>

TABLE 2.2.2 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1998-2007 – NUMBER OF JOBS

This table contains the disaggregation of Table 2.2.1 by Bay Area sub-regions.

Number of Jobs (000s)

TOTAL	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	449.7	468.5	484.4	496.4	493.3	499.2	494.0	497.0	501.9	503.4
East Bay	978.4	1,009.8	1,047.0	1,057.8	1,042.9	1,028.6	1,024.1	1,035.7	1,047.8	1,049.5
South Bay	1,322.0	1,350.5	1,427.3	1,395.4	1,268.0	1,206.6	1,196.6	1,202.6	1,215.5	1,238.2
San Francisco	564.0	575.0	598.3	573.2	534.8	513.1	503.8	509.2	520.9	539.5
Regional Total	3,314.1	3,403.8	3,557.0	3,522.8	3,339.0	3,247.5	3,218.5	3,244.5	3,286.1	3,330.6

Farm										
North Bay	13.6	13.6	14.6	15.0	14.3	13.3	13.5	12.5	12.7	13.1
East Bay	2.1	1.9	2.3	3.0	3.0	3.0	2.6	1.5	1.5	1.6
South Bay	10.1	10.2	9.8	9.9	9.6	9.2	8.9	8.4	5.7	5.7
San Francisco	0.3	0.2	0.3	0.2	0.3	0.3	0.4	0.1	0.3	0.2
Regional Total	26.1	25.9	27.0	28.1	27.2	25.8	25.4	22.5	20.2	20.6

Natural Resources, Mining & Construction										
North Bay	27.9	31.7	35.2	37.2	37.5	46.0	39.5	41.6	41.0	38.5
East Bay	55.4	62.3	67.9	71.3	67.8	68.0	70.3	75.1	74.6	73.6
South Bay	59.9	64.8	69.0	69.8	63.6	59.8	60.9	60.8	62.9	64.3
San Francisco	17.0	18.3	18.9	19.7	17.9	17.3	16.9	16.7	17.5	18.3
Regional Total	160.2	177.1	191.0	198.0	186.8	191.1	187.6	194.2	196.0	194.7

Manufacturing										
North Bay	52.1	53.6	54.7	54.9	51.1	47.9	47.3	46.8	46.6	45.8
East Bay	114.6	112.1	116.5	113.2	103.6	98.0	99.1	95.4	96.9	93.7
South Bay	287.1	276.6	294.1	282.4	239.5	211.8	203.3	199.8	197.4	194.4
San Francisco	25.2	23.1	21.6	17.8	15.1	13.1	12.2	11.8	11.1	11.1
Regional Total	479.0	465.4	486.9	468.3	409.3	370.8	361.9	353.8	352.0	345.0

Trade, Transportation & Utilities										
North Bay	82.3	84.3	84.9	87.1	87.7	89.3	89.4	90.1	90.6	91.3
East Bay	195.6	202.7	207.6	210.0	204.6	197.2	192.8	195.2	195.4	198.1
South Bay	233.5	236.9	243.1	237.2	217.8	208.7	206.5	207.2	208.4	212.7
San Francisco	81.7	80.1	82.0	78.0	74.2	71.2	69.7	70.0	69.7	69.2
Regional Total	593.1	604.0	617.6	612.3	584.3	566.4	558.4	562.5	564.1	571.3

Information										
North Bay	11.4	11.0	11.2	11.2	10.5	10.0	9.8	9.1	7.7	7.7
East Bay	34.3	35.0	39.0	37.7	35.2	32.6	31.0	30.4	29.8	29.4
South Bay	42.7	50.3	66.8	68.1	57.6	53.9	53.7	55.3	56.9	56.8
San Francisco	21.6	25.9	34.7	29.8	23.7	20.5	19.5	17.6	18.1	19.4
Regional Total	110.0	122.2	151.7	146.8	127.0	117.0	114.0	112.4	112.5	113.3

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Number of Jobs (000s)

Financial Activities	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	24.8	25.8	26.3	26.9	27.7	28.5	27.8	27.9	28.0	26.5
East Bay	48.8	50.0	50.6	58.6	62.5	67.7	67.2	70.5	69.0	62.3
South Bay	60.0	60.4	59.1	59.6	57.7	56.2	56.5	57.4	58.4	58.3
San Francisco	60.8	61.6	62.9	68.2	63.5	59.1	57.7	57.5	58.0	59.0
Regional Total	194.4	197.8	198.9	213.3	211.4	211.5	209.2	213.3	213.4	206.1

Professional & Business Services										
North Bay	49.6	53.9	57.3	55.6	53.7	53.2	55.3	55.4	58.8	60.2
East Bay	151.6	160.2	170.2	159.0	149.6	144.9	146.7	150.6	155.0	155.5
South Bay	256.3	273.3	299.2	275.5	226.6	215.5	215.6	218.9	225.0	239.4
San Francisco	130.5	134.2	144.2	129.7	111.6	103.4	100.5	104.8	111.0	117.3
Regional Total	588.0	621.6	670.9	619.8	541.5	517.0	518.1	529.7	549.8	572.4

Educational & Health Services										
North Bay	53.8	55.5	57.6	60.1	61.5	61.8	61.7	62.1	63.0	64.2
East Bay	105.8	109.2	110.7	112.5	114.7	117.0	117.9	118.6	121.9	124.7
South Bay	113.1	114.0	114.0	119.5	121.7	123.6	125.2	127.0	132.2	133.6
San Francisco	55.9	56.9	52.6	51.9	51.7	53.2	53.8	54.6	56.0	57.5
Regional Total	328.6	335.6	334.9	344.0	349.6	355.6	358.6	362.3	373.1	380.0

Leisure & Hospitality										
North Bay	46.6	48.4	49.8	52.0	52.8	53.6	54.0	54.2	54.9	56.3
East Bay	70.8	72.4	73.7	77.9	79.9	80.4	80.6	82.6	85.7	87.5
South Bay	98.4	99.6	103.3	104.2	99.6	99.3	101.6	103.7	107.4	109.7
San Francisco	68.1	70.7	72.2	72.2	69.9	69.6	70.5	71.8	74.0	76.4
Regional Total	283.9	291.1	299.0	306.3	302.2	302.9	306.7	312.3	322.0	329.9

Other Services										
North Bay	16.1	16.1	16.4	16.6	16.7	16.9	17.2	16.8	17.0	17.0
East Bay	30.5	31.0	31.9	35.8	37.8	37.5	37.0	35.8	35.9	36.2
South Bay	36.6	36.8	37.7	37.5	38.2	36.7	36.0	36.1	35.5	36.4
San Francisco	25.9	25.2	25.1	24.9	22.5	21.7	21.0	21.7	21.4	21.9
Regional Total	109.1	109.1	111.1	114.8	115.2	112.8	111.2	110.4	109.8	111.5

Government										
North Bay	71.5	74.6	76.4	79.8	79.8	78.7	78.5	80.5	81.6	82.8
East Bay	168.9	173.0	176.6	178.8	184.2	182.3	178.9	180.0	182.1	186.9
South Bay	124.3	127.6	131.2	131.7	136.1	131.9	128.4	128.0	125.7	126.9
San Francisco	77.0	78.8	83.8	80.8	84.4	83.7	81.6	82.6	83.8	89.2
Regional Total	441.7	454.0	468.0	471.1	484.5	476.6	467.4	471.1	473.2	485.8

Source:

* California Employment Development Department, Industry Employment & Labor Force - by Annual Average
<http://www.labormarketinfo.edd.ca.gov/?PAGEID=171>

TABLE 2.2.3 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1998-2007 – ANNUAL PERCENTAGE DISTRIBUTION

This table contains the percentage distribution across the Bay Area of the industry group data from Table 2.2.2.

Annual Percentage Distribution

TOTAL	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	13.6	13.8	13.6	14.1	14.8	15.4	15.3	15.3	15.3	15.1
East Bay	29.5	29.7	29.4	30.0	31.2	31.7	31.8	31.9	31.9	31.5
South Bay	39.9	39.7	40.1	39.6	38.0	37.2	37.2	37.1	37.0	37.2
San Francisco	17.0	16.9	16.8	16.3	16.0	15.8	15.7	15.7	15.9	16.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Farm										
North Bay	52.1	52.5	54.1	53.4	52.6	51.6	53.1	55.6	62.9	63.6
East Bay	8.0	7.3	8.5	10.7	11.0	11.6	10.2	6.7	7.4	7.8
South Bay	38.7	39.4	36.3	35.2	35.3	35.7	35.0	37.3	28.2	27.7
San Francisco	1.1	0.8	1.1	0.7	1.1	1.2	1.6	0.4	1.5	1.0
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Natural Resources, Mining & Construction										
North Bay	17.4	17.9	18.4	18.8	20.1	24.1	21.1	21.4	20.9	19.8
East Bay	34.6	35.2	35.5	36.0	36.3	35.6	37.5	38.7	38.1	37.8
South Bay	37.4	36.6	36.1	35.3	34.0	31.3	32.5	31.3	32.1	33.0
San Francisco	10.6	10.3	9.9	9.9	9.6	9.1	9.0	8.6	8.9	9.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Manufacturing										
North Bay	10.9	11.5	11.2	11.7	12.5	12.9	13.1	13.2	13.2	13.3
East Bay	23.9	24.1	23.9	24.2	25.3	26.4	27.4	27.0	27.5	27.2
South Bay	59.9	59.4	60.4	60.3	58.5	57.1	56.2	56.5	56.1	56.3
San Francisco	5.3	5.0	4.4	3.8	3.7	3.5	3.4	3.3	3.2	3.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Trade, Transportation & Utilities										
North Bay	13.9	14.0	13.7	14.2	15.0	15.8	16.0	16.0	16.1	15.0
East Bay	33.0	33.6	33.6	34.3	35.0	34.8	34.5	34.7	34.6	34.7
South Bay	39.4	39.2	39.4	38.7	37.3	36.8	37.0	36.8	36.9	37.2
San Francisco	13.8	13.3	13.3	12.7	12.7	12.6	12.5	12.4	12.4	12.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Information										
North Bay	10.4	9.0	7.4	7.6	8.3	8.5	8.6	8.1	6.8	6.8
East Bay	31.2	28.6	25.7	25.7	27.7	27.9	27.2	27.0	26.5	25.9
South Bay	38.8	41.2	44.0	46.4	45.4	46.1	47.1	49.2	50.6	50.1
San Francisco	19.6	21.2	22.9	20.3	18.7	17.5	17.1	15.7	16.1	17.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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Annual Percentage Distribution

Financial Activities	1996	1999	2000	2001	2002	2003	2004	2005	2006	2007
North Bay	12.8	13.0	13.2	12.6	13.1	13.5	13.3	13.1	13.1	12.9
East Bay	25.1	25.3	25.4	27.5	29.6	32.0	32.1	33.1	32.3	30.2
South Bay	30.9	30.5	29.7	27.9	27.3	26.6	27.0	26.9	27.4	28.3
San Francisco	31.3	31.1	31.6	32.0	30.0	27.9	27.6	27.0	27.2	28.6
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Professional & Business Services

North Bay	8.4	8.7	8.5	9.0	9.9	10.3	10.7	10.5	10.7	10.5
East Bay	25.8	25.8	25.4	25.7	27.6	28.0	28.3	28.4	28.2	27.2
South Bay	43.6	44.0	44.6	44.4	41.8	41.7	41.6	41.3	40.9	41.8
San Francisco	22.2	21.6	21.5	20.9	20.6	20.0	19.4	19.8	20.2	20.5
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Educational & Health Services

North Bay	16.4	16.5	17.2	17.5	17.6	17.4	17.2	17.1	16.9	16.9
East Bay	32.2	32.5	33.1	32.7	32.8	32.9	32.9	32.7	32.7	32.8
South Bay	34.4	34.0	34.0	34.7	34.8	34.8	34.9	35.1	35.4	35.2
San Francisco	17.0	17.0	15.7	15.1	14.8	15.0	15.0	15.1	15.0	15.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Leisure & Hospitality

North Bay	16.4	16.6	16.7	17.0	17.5	17.7	17.6	17.4	17.0	17.1
East Bay	24.9	24.9	24.6	25.4	26.4	26.5	26.3	26.4	26.6	26.5
South Bay	34.7	34.2	34.5	34.0	33.0	32.8	33.1	33.2	33.4	33.3
San Francisco	24.0	24.3	24.1	23.6	23.1	23.0	23.0	23.0	23.0	23.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Other Services

North Bay	14.8	14.8	14.8	14.5	14.5	15.0	15.5	15.2	15.5	15.2
East Bay	28.0	28.4	28.7	31.2	32.8	33.2	33.3	32.4	32.7	32.5
South Bay	33.5	33.7	33.9	32.7	32.2	32.5	32.4	32.7	32.3	32.6
San Francisco	23.7	23.1	22.6	21.7	19.5	19.2	18.9	19.7	19.5	19.6
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Government

North Bay	16.2	16.4	16.3	16.9	16.5	16.5	16.8	17.1	17.2	17.0
East Bay	38.2	38.1	37.7	38.0	38.0	38.3	38.3	38.2	38.5	38.5
South Bay	28.1	28.1	28.0	28.0	28.1	27.7	27.5	27.2	26.6	26.1
San Francisco	17.4	17.4	17.9	17.2	17.4	17.6	17.5	17.5	17.7	18.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source:

• California Employment Development Department, Industry Employment & Labor Force - by Annual Average

<http://www.labormarketinfo.edd.ca.gov/?PAGEID=171>

TABLE 2.2.4 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1998-2007 – PERCENTAGE CHANGE

This table contains the annual percentage change in employment by industry group within each sub-region of the Bay Area.

Percentage Change									
TOTAL	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
North Bay	4.2	3.4	2.5	-0.6	1.2	-1.0	0.6	1.0	0.3
East Bay	3.2	3.7	1.0	-1.4	-1.4	-0.4	1.1	1.2	0.2
South Bay	2.2	5.7	-2.2	-9.1	-4.8	-0.8	0.5	1.1	1.9
San Francisco	2.0	4.1	-4.2	-6.7	-4.1	-1.8	1.1	2.3	3.6
Regional Total	2.7	4.5	-1.0	-5.2	-2.7	-0.9	0.8	1.3	1.4
Farm									
North Bay	0.0	7.4	2.7	-4.7	-7.0	1.5	-7.4	1.6	3.1
East Bay	-9.5	21.1	30.4	0.0	0.0	-13.3	-42.3	0.0	6.7
South Bay	1.0	-3.9	1.0	-3.0	-4.2	-3.3	-5.6	-32.1	0.0
San Francisco	-33.3	50.0	-33.3	50.0	0.0	33.3	-75.0	200.0	-33.3
Regional Total	-0.8	4.2	4.1	-3.2	-5.1	-1.6	-11.4	-10.2	2.0
Natural Resources, Mining & Construction									
North Bay	13.6	11.0	5.7	0.8	22.7	-14.1	5.3	-1.4	-6.1
East Bay	12.5	9.0	5.0	-4.9	0.3	3.4	6.8	-0.7	-1.3
South Bay	8.2	6.5	1.2	-8.9	-6.0	1.8	-0.2	3.5	2.2
San Francisco	7.6	3.3	4.2	-9.1	-3.4	0.0	0.0	0.0	4.6
Regional Total	10.5	7.8	3.7	-5.7	2.3	-1.8	3.5	0.9	-0.7
Manufacturing									
North Bay	2.9	2.1	0.4	-6.9	-6.3	-1.3	-1.1	-0.4	-1.7
East Bay	-2.2	3.9	-2.8	-8.5	-5.4	1.1	-3.7	1.6	-3.3
South Bay	-3.7	6.3	-4.0	-15.2	-11.6	-4.0	-1.7	-1.2	-1.5
San Francisco	-8.3	-6.5	-17.6	-15.2	-13.2	-6.9	-3.3	-5.9	0.0
Regional Total	-2.8	4.6	-3.8	-12.6	-9.4	-2.4	-2.2	-0.5	-2.0
Trade, Transportation & Utilities									
North Bay	2.4	0.7	2.6	0.7	1.8	0.1	0.8	0.6	0.8
East Bay	3.6	2.4	1.2	-2.6	-3.6	-2.2	1.2	0.1	1.4
South Bay	1.5	2.6	-2.4	-8.2	-4.2	-1.1	0.3	0.6	2.1
San Francisco	-2.0	2.4	-4.9	-4.9	-4.0	-2.1	0.4	-0.4	-0.7
Regional Total	1.8	2.3	-0.9	-4.6	-3.1	-1.4	0.7	0.3	1.3
Information									
North Bay	-3.5	1.8	0.0	-6.2	-4.8	-2.0	-7.1	-15.4	0.0
East Bay	2.0	11.4	-3.3	-6.6	-7.4	-4.9	-1.9	-2.0	-1.3
South Bay	17.8	32.8	1.9	-15.4	-6.4	-0.4	3.0	2.9	-0.2
San Francisco	19.9	34.0	-14.1	-20.5	-13.5	-4.9	-9.7	2.8	7.2
Regional Total	11.1	24.1	-3.2	-13.5	-7.9	-2.6	-1.4	0.1	0.7

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Percentage Change

Financial Activities	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
North Bay	4.0	1.9	2.3	3.0	2.9	-2.5	0.4	0.4	-5.4
East Bay	2.5	1.2	15.8	6.7	8.3	-0.7	4.9	-2.1	-9.7
South Bay	0.7	-2.2	0.8	-3.2	-2.6	0.5	1.6	1.7	-0.2
San Francisco	1.3	2.1	8.4	-6.9	-6.9	-2.4	-0.3	0.9	1.7
Regional Total	1.7	0.6	7.2	-0.9	0.0	-1.1	2.0	0.0	-3.4

Professional & Business Services									
North Bay	8.7	6.3	-3.0	-3.4	-0.9	3.9	0.2	6.1	2.4
East Bay	5.7	6.2	-6.6	-5.9	-3.1	1.2	2.7	2.9	0.3
South Bay	6.6	9.5	-7.9	-17.7	-4.9	0.0	1.5	2.8	6.4
San Francisco	2.8	7.5	-10.1	-14.0	-7.3	-2.8	4.3	5.9	5.7
Regional Total	5.7	7.9	-7.6	-12.6	-4.5	0.2	2.2	3.8	4.1

Educational & Health Services									
North Bay	3.2	3.8	4.3	2.3	0.5	-0.2	0.6	1.4	1.9
East Bay	3.2	1.4	1.6	2.0	2.0	0.8	0.6	2.8	2.3
South Bay	0.8	0.0	4.8	1.8	1.6	1.3	1.4	4.1	1.1
San Francisco	1.8	-7.6	-1.3	-0.4	2.9	1.1	1.5	2.6	2.7
Regional Total	2.1	-0.2	2.7	1.6	1.7	0.8	1.0	3.0	1.8

Leisure & Hospitality									
North Bay	3.9	2.9	4.4	1.5	1.5	0.7	0.4	1.3	2.6
East Bay	2.3	1.8	5.7	2.6	0.6	0.2	2.5	3.8	2.1
South Bay	1.2	3.7	0.9	-4.4	-0.3	2.3	2.1	3.6	2.1
San Francisco	3.8	2.1	0.0	-3.2	-0.4	1.3	1.8	3.1	3.2
Regional Total	2.1	2.7	2.4	-1.3	0.2	1.3	1.8	3.1	2.5

Other Services									
North Bay	0.0	1.9	1.2	0.6	1.2	1.8	-2.3	1.2	0.0
East Bay	1.6	2.9	12.2	5.6	-0.8	-1.3	-3.2	0.3	0.8
South Bay	0.5	2.4	-0.5	1.9	-3.9	-1.9	0.3	-1.7	2.5
San Francisco	-2.7	-0.4	-0.8	-9.6	-3.6	-3.2	3.3	-1.4	2.3
Regional Total	0.0	1.8	3.3	0.3	-2.1	-1.4	-0.7	-0.5	1.5

Government									
North Bay	4.3	2.4	4.5	0.0	-1.4	-0.3	2.5	1.4	1.5
East Bay	2.4	2.1	1.2	3.0	-1.0	-1.9	0.6	1.2	2.6
South Bay	2.7	2.8	0.4	3.3	-3.1	-2.7	-0.3	-1.8	1.0
San Francisco	2.3	6.3	-3.6	4.5	-0.8	-2.5	1.2	1.5	6.4
Regional Total	2.8	3.1	0.7	2.8	-1.6	-1.9	0.8	0.4	2.7

Source:

• California Employment Development Department, Industry Employment & Labor Force - by Annual Average
<http://www.labormarketinfo.edd.ca.gov/?PAGEID=171>

3.0 EMPLOYMENT

This Chapter provides information about the employment trends in San Francisco from 1999 to 2008. The employment data presented in this chapter are based on the payroll jobs in San Francisco provided by the California Employment Development Department (EDD). The data are reported as annual average based on the quarterly average employment data. It is important to note that these employment data differ from the benchmark data provided by EDD on its web site (<http://www.labormarketinfo.edd.ca.gov>). The latter data omit private household employment data (NAICS 814) and are adjusted throughout the year. The NAICS 814 classification counts private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of the household as distinct employment “establishments.” These household employees include cooks, maids, butlers, private caregivers, gardeners, groundskeeper/caretakers, and other household maintenance workers.

Employment data are presented by the major economy sectors under each type of land use category. From 1999 and 2000, economic sectors were organized according to Standard Industrial Classification system (SIC). In 2001, economic sectors started being organized according to North American Industry Classification system (NAICS). Both industry classification systems are discussed in Section 1.2 – Data Formats. Table 1.1 in Chapter 1 shows the closest match between SIC economic sectors and NAICS economic sectors. It is not possible to get a 100%

match between their industry groups because under the NAICS, certain industries have been moved from one economic sector to another. Due to restructuring of economic sectors, employment numbers may appear significantly higher or lower in certain economic sectors when compared to previous years’ employment numbers.

Employment is defined as number of employees who were either at work or temporarily absent from work due to illness, vacation, strike, or other personal reasons. Employment data are collected by place of work. A person holding a job in San Francisco is part of the San Francisco employment pool regardless of his or her place of residence. A person holding more than one job is counted separately for each job. However, the EDD wage and salary employment data do not include self-employed persons, of which there were approximately 61,000 in 2005 according to the City of San Francisco’s Office of the Treasurer and Tax Collector. The EDD wage and salary employment data also do not include unpaid family workers, volunteers, or persons involved in trade disputes.

Employment data is reported both for the entire city and the city’s ten Commerce and Industry Districts under five Land Use categories - Office, Retail, Production/Distribution/Repair (PDR), Hotel, and Cultural/Institutional/Educational (CIE). For an explanation of Land Use Category and Commerce and Industry District, refer to Section 1.2 - Data Formats.

Employment data reported by land use category will not be consistent with publications prior to 2001. Public administration jobs have been included in different land use categories in other publications. This publication includes public administration jobs in the Office land use category for all years; necessary adjustments were made to data from previous years. Public administration jobs were also classified as Office land uses in the 2001 publication. For 1999 and 2000 data, public administration jobs were parsed out in Office, PDR, and CIE land use categories.

Table 3.1 shows employment data by Land Use Category from 1999 to 2008. Tables 3.2.1 through 3.2.4 show employment data by Industry Group within each Land Use Category in San Francisco from 1999 to 2008. Table 3.3 presents San Francisco employment in its geographic context. It shows employment data by Land Use Category in ten Commerce and Industry Districts in San Francisco in 2008. It also shows Private Household employment as a subset of the Other land use category. This category represents home-based business establishments and organizations, particularly care-givers. These employees were previously classified under the Cultural/Institutional/Educational land use category.

Employment by Land Use Category

- *Table 3.1 San Francisco Employment by Land Use Category, 1999-2008* — All land use categories except PDR showed gains in employment in 2008. Even within the PDR land use category, however, the loss of jobs was minimal. Overall, in 2008 the number of jobs in San Francisco increased by 2.6%; this is less than the 3.8% growth from the previous year.
- *Table 3.2.1 Office Employment by Industry Groups, 1999-2008* — Office Services, by far the largest office group, posted a 3% gain in 2008. The Public Administration industry group had the greatest increase, growing by almost 4,000 jobs (12.6%). All the other Industry Groups except for Finance and Insurance also posted job gains.

- *Table 3.2.2 Retail Employment by Industry Group, 1999-2008* — Within the retail land use category, growth patterns continued to fluctuate even as all industry groups maintained approximately the same share of the industry in the last five years, with the exception of Eating and Drinking Place jobs for which the percentage has been steadily increasing since 2003. Within the Retail land use category, only Eating and Drinking Places and Food Stores posted job gains in 2008.
- *Table 3.2.3 PDR Employment by Industry Group, 1999-2008* — Within the PDR land use category, the Apparel Manufacturing, Transportation, Other Manufacturing, and Printing and Publishing groups experienced job losses. All other PDR Industry Groups experienced job growth in 2008.
- *Table 3.2.4 Cultural/Institutional/Educational (CIE) Employment by Industry Group, 1999-2008* — All CIE Industry Groups except for Art & Recreation and Health Care showed employment gains in 2008, with Other CIE Services showing the healthiest gain (17.2%).

Employment by Geographic District

- *Table 3.3 Employment by Commerce and Industry District and Land Use Category, 2008* — Most of the jobs are located in the Financial (31.7%) and South of Market (21.6%) districts. The Mission (3.0%), North Beach (3.2%), and Van Ness (3.3%) districts have the fewest number of jobs. Employment in the private households (jobs that are home-based) account for about 2.9% of the total jobs.

TABLE 3.1 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 1999-2008

This table contains the number of jobs in each of the five major non-residential land use categories in San Francisco. Data is presented from 1999-2008, although the 2001 switch in classification systems from SIC to NAICS means that it is inappropriate to directly compare between 1999-2000 data and 2001-2008 data (see Section 1.2 - Data Formats for a description of land use categories and an SIC-NAICS discussion). Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 3.1.1 (a snapshot of job distribution in 2008) and 3.1.2 (a look at ten-year trends).

Annual Average Number of Jobs

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Office	229,285	243,290	236,959	213,813	201,492	193,180	195,521	206,271	214,661	221,250
Retail	97,159	103,508	101,505	93,735	95,599	95,006	96,033	98,294	102,253	103,443
PDR	117,588	116,540	107,837	97,860	93,726	89,037	84,693	81,699	84,986	84,710
Hotel	19,522	18,862	17,962	16,477	17,438	18,090	18,424	19,087	19,070	19,527
CIE	127,611	126,066	122,222	122,254	124,882	127,962	128,726	130,645	135,361	141,848
TOTAL	591,166	608,266	586,485	546,960	533,136	523,274	523,396	535,996	556,330	570,778

Annual Percentage Distribution

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Office	38.8	40.0	40.4	39.1	37.8	36.9	37.4	38.5	38.6	38.8
Retail	16.4	17.0	17.3	17.6	17.9	18.2	18.3	18.3	18.4	18.1
PDR	19.9	19.2	18.4	17.9	17.6	17.0	16.2	15.2	15.3	14.8
Hotel	3.3	3.1	3.1	3.0	3.3	3.5	3.5	3.6	3.4	3.4
CIE	21.6	20.7	20.8	22.3	23.4	24.5	24.6	24.4	24.3	24.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Office	6.1	N/A	-9.8	-5.8	-4.1	1.2	5.5	4.1	3.1
Retail	6.5	N/A	-4.9	-1.0	-0.6	1.1	2.4	4.0	1.2
PDR	-0.9	N/A	-9.3	-4.2	-5.0	-4.9	-3.5	4.0	-0.3
Hotel	-3.4	N/A	-8.3	5.8	3.7	1.8	3.6	-0.1	2.4
CIE	-1.2	N/A	0.0	2.1	2.5	0.6	1.5	3.6	4.8
TOTAL	2.9	N/A	-6.7	-2.5	-1.8	0.0	2.4	3.8	2.6

Notes:

- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- CIE = Cultural, Institutional, or Educational
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- From 1999-2005, annual average includes last quarter of previous year, and first three quarters of current year.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

FIGURE 3.1.1 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2008

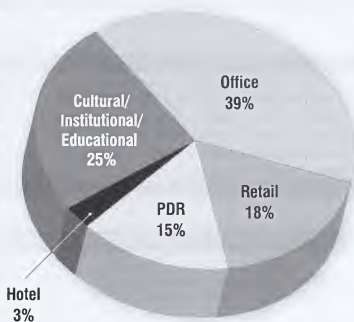


FIGURE 3.1.2 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 1999-2008

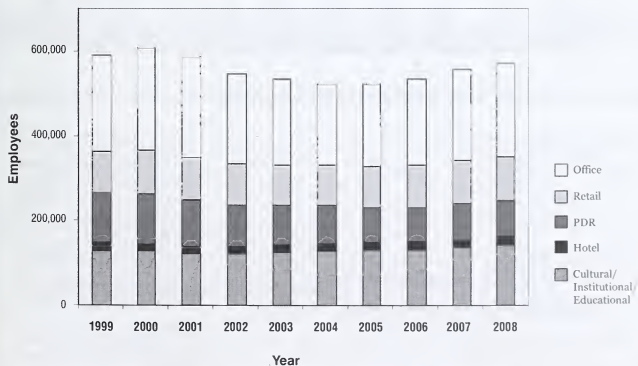


TABLE 3.2.1 OFFICE EMPLOYMENT BY INDUSTRY GROUP, 1999-2008

This table presents job trends in the office land use category. Also included is the percentage distribution in any given year and the annual change within the office land use category. Figure 3.2.1 presents the job trends graphically.

Annual Average Number of Jobs

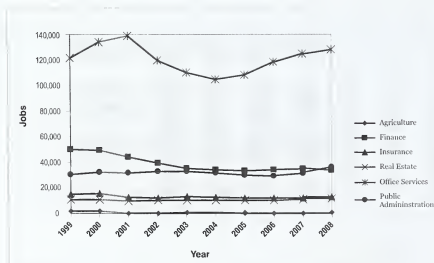
Industry Group	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Agriculture	1,732	1,674	172	173	404	385	228	241	220	251
Finance	49,886	49,366	44,064	39,381	35,314	33,748	33,554	34,239	34,975	33,033
Insurance	14,855	15,448	12,417	12,070	12,897	12,527	12,174	11,962	12,249	12,003
Real Estate	10,741	10,576	9,763	9,866	10,177	9,910	10,033	10,316	10,704	10,739
Office Services	121,456	133,830	138,862	119,468	109,970	104,611	108,312	118,328	124,973	128,754
Public Administration	30,615	32,395	31,681	32,834	32,718	31,635	29,834	29,339	31,490	35,458
TOTAL	229,285	243,290	236,959	213,791	201,480	192,816	194,136	204,425	214,611	220,237

Annual Percentage Distribution

Industry Group	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Agriculture	0.8	0.7	0.1	0.1	0.2	0.2	0.1	0.1	0.1	0.1
Finance	21.8	20.3	18.6	18.4	17.5	17.3	17.3	16.7	16.3	15.0
Insurance	6.5	6.3	5.2	5.6	6.4	6.5	6.3	5.9	5.7	5.5
Real Estate	4.7	4.3	4.1	4.6	5.1	5.1	5.2	5.0	5.0	4.9
Office Services	53.0	55.0	58.6	55.9	54.6	54.3	55.8	57.9	58.2	58.5
Public Administration	13.4	13.3	13.4	15.4	16.2	16.4	15.4	14.4	14.7	16.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Agriculture	-3.4	N/A	0.9	133.3	-4.9	-40.8	5.8	-8.5	13.7
Finance	-1.0	N/A	-10.6	-10.3	-4.4	-0.6	2.0	2.1	-5.6
Insurance	4.0	N/A	-2.8	6.8	-2.9	-2.8	-1.7	2.4	-2.0
Real Estate	-1.5	N/A	1.0	3.2	-2.6	1.2	2.8	3.8	0.3
Office Services	10.2	N/A	-14.0	-8.0	-4.9	3.5	9.2	5.6	3.0
Public Administration	5.8	N/A	3.6	-0.4	-3.3	-5.7	-1.7	7.3	12.6
TOTAL	6.1	N/A	-9.8	-5.8	-4.3	0.7	5.3	5.0	2.6

FIGURE 3.2.1 OFFICE EMPLOYMENT BY INDUSTRY GROUP, 1999-2008**Notes:**

- Due to rounding, figures may not add to the total shown.
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Sum is less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- Agriculture refers to those working in offices whose line of work is related to agriculture.
- Office Services consists of the following:
 - Management of companies and enterprises
 - Professional, scientific, and technical Services
 - Administrative and support
 - Internet publishing & broadcasting
 - Internet, web search, & data processing services
 - Other information services

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 3.2.2 RETAIL EMPLOYMENT BY INDUSTRY GROUP, 1999-2008

This table presents job trends in the retail land use category. Also included is the percentage distribution in any given year and the annual change within the retail land use category. Figure 3.2.2 presents the job trends graphically.

Annual Average Number of Jobs

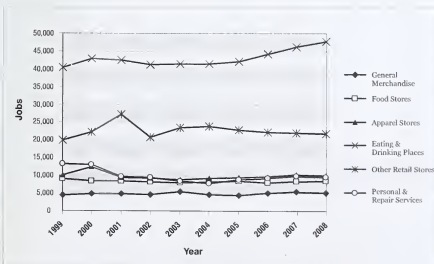
Industry Group	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
General Merchandise	4,372	4,800	4,736	4,631	5,543	4,662	4,401	4,921	5,486	5,337
Food Stores	9,041	8,448	8,311	8,210	8,051	8,144	8,394	7,940	8,382	8,694
Apparel Stores	10,135	12,259	9,348	9,209	8,871	9,285	9,509	9,698	10,313	10,117
Eating & Drinking Places	40,481	42,820	42,415	41,214	41,358	41,378	42,139	44,183	46,260	47,662
Other Retail Stores	19,893	22,174	27,165	20,762	23,356	23,859	22,794	22,247	22,033	21,926
Personal & Repair Services	13,237	13,006	9,531	9,349	8,419	7,678	8,795	9,306	9,780	9,707
TOTAL	97,159	103,508	101,505	93,375	95,599	95,006	96,033	98,294	102,253	103,443

Annual Percentage Distribution

Industry Group	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
General Merchandise	4.5	4.6	4.7	5.0	5.8	4.9	4.6	5.0	5.4	5.2
Food Stores	9.3	8.2	8.2	8.8	8.4	8.6	8.7	8.1	8.2	8.4
Apparel Stores	10.4	11.8	9.2	9.9	9.3	9.8	9.9	9.9	10.1	9.8
Eating & Drinking Places	41.7	41.4	41.8	44.1	43.3	43.6	43.9	44.9	45.2	46.1
Other Retail Stores	20.5	21.4	26.8	22.2	24.4	25.1	23.7	22.6	21.5	21.2
Personal & Repair Services	13.6	12.6	9.4	10.0	8.8	8.1	9.2	9.5	9.6	9.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
General Merchandise	9.8	N/A	-2.2	19.7	-15.9	-5.6	11.8	11.5	-2.7
Food Stores	-6.6	N/A	-1.2	-1.9	1.2	3.1	-5.4	5.6	3.7
Apparel Stores	21.0	N/A	-1.5	-3.7	4.7	2.4	2.0	6.3	-1.9
Eating & Drinking Places	5.8	N/A	-2.8	0.3	0.0	1.8	4.9	4.7	3.0
Other Retail Stores	11.5	N/A	-23.6	12.5	2.2	-4.5	-2.4	-1.0	-0.5
Personal & Repair Services	-1.7	N/A	-1.9	-9.9	-8.8	14.6	5.8	5.1	-0.7
TOTAL	6.5	N/A	-8.0	2.4	-0.6	1.1	2.4	4.0	1.2

FIGURE 3.2.2 RETAIL EMPLOYMENT BY INDUSTRY GROUP, 1999-2008**Notes:**

- Due to rounding, figures may not add to the total shown
- Data through 2000 data based on SIC, 2001 and subsequent years are based on NAICS
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Other Retail Stores include:
 - Motor vehicle parts and dealers
 - Electronics and appliance stores
 - Furniture and home furnishings stores
 - Miscellaneous retail stores
 - Rental and leasing services
 - Building material and garden equipment supply dealers
 - Health and personal care stores
 - Gasoline stations
 - Sporting goods, hobby, book, and music stores
 - Non-store retailers

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

**TABLE 3.2.3 PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT
BY INDUSTRY GROUP, 1999-2008**

This table presents job trends in the PDR land use category. Also included is the percentage distribution in any given year and the annual change within the PDR land use category. Figure 3.2.3 presents the job trends graphically.

Annual Average Number of Jobs

Industry Group	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Construction	17,557	18,812	19,803	18,449	18,085	17,527	16,615	17,397	19,415	19,630
Transportation	24,081	25,313	25,118	22,170	21,653	21,099	20,222	19,204	19,071	17,484
Utilities	11,816	11,401	10,548	10,624	10,311	10,517	10,503	9,541	7,061	7,837
Information	11,861	12,101	10,897	10,603	9,415	8,226	6,930	6,189	8,350	8,359
Wholesale	20,855	20,263	13,872	12,792	12,754	12,306	12,087	11,729	12,274	12,377
Food Manufacturing	2,982	2,898	3,025	2,615	2,607	2,533	2,572	2,052	1,974	2,008
Apparel Manufacturing	12,197	10,574	6,220	5,396	4,779	4,256	3,387	3,172	2,864	2,426
Printing & Publishing	8,420	8,724	9,424	8,413	7,960	7,804	7,494	7,419	7,738	7,379
Other Manufacturing	7,819	6,452	8,931	6,411	6,171	4,747	4,815	4,921	6,050	5,626
TOTAL	117,588	116,540	107,837	97,473	93,735	89,014	84,623	81,625	84,796	83,125

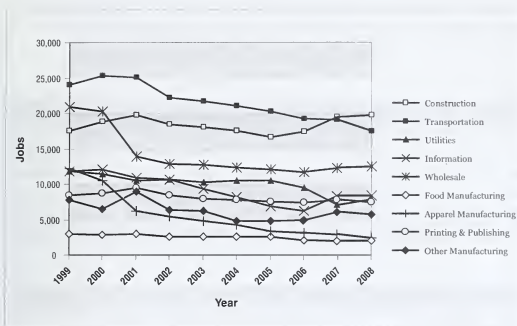
Annual Percentage Distribution

Industry Group	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Construction	14.9	16.1	18.4	18.9	19.3	19.7	19.6	21.3	22.9	23.6
Transportation	20.5	21.7	23.3	22.7	23.1	23.7	23.9	23.5	22.5	21.0
Utilities	10.0	9.8	9.8	10.9	11.0	11.8	12.4	11.7	8.3	9.4
Information	10.1	10.4	10.1	10.9	10.0	9.2	8.2	7.6	9.8	10.1
Wholesale	17.7	17.4	12.9	13.1	13.6	13.8	14.3	14.4	14.5	14.9
Food Manufacturing	2.5	2.5	2.8	2.7	2.8	2.8	3.0	2.5	2.3	2.4
Apparel Manufacturing	10.4	9.1	5.8	5.5	5.1	4.8	4.0	3.9	3.4	2.9
Printing & Publishing	7.2	7.5	8.7	8.6	8.5	8.8	8.9	9.1	9.1	8.9
Other Manufacturing	6.6	5.5	8.3	6.6	6.6	5.3	5.7	6.0	7.1	6.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Construction	7.1	N/A	-6.8	-2.0	-3.1	-5.2	4.7	11.6	1.1
Transportation	5.1	N/A	-11.7	-2.3	-2.6	-4.2	-5.0	-0.7	-8.3
Utilities	-3.5	N/A	0.7	-2.9	2.0	-0.1	-9.2	-26.0	11.0
Information	2.0	N/A	-2.7	-11.2	-12.6	-15.8	-10.7	34.9	0.1
Wholesale	-2.8	N/A	-7.8	-0.3	-3.5	-1.7	-3.0	4.6	0.8
Food Manufacturing	-2.8	N/A	-13.6	-0.3	-2.9	1.6	-20.2	-3.8	1.7
Apparel Manufacturing	-13.3	N/A	-13.2	-11.4	-10.9	-20.4	-6.4	-9.7	-15.3
Printing & Publishing	3.6	N/A	-10.7	-5.4	-2.0	-4.0	-1.0	4.3	-4.6
Other Manufacturing	-17.5	N/A	-28.2	-3.7	-23.1	1.4	2.2	22.9	-7.0
TOTAL	-0.9	N/A	-9.6	-3.8	-5.0	-4.9	-3.5	3.9	-2.0

FIGURE 3.2.3 PRODUCTION/DISTRIBUTION/REPAIR (PDR) EMPLOYMENT BY INDUSTRY GROUP, 1999-2008



Notes:

- PDR = Production/Distribution/Repair
- Due to rounding, figures may not add to the total shown.
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Sum is less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- Information Establishments include:
 - Broadcasting except internet
 - Telecommunications
- Other Manufacturing includes:
 - Lumber, furniture & fixtures, paper products
 - Chemicals and petroleum production
 - Rubber, leather, stone/clay/glass/concrete
 - Metal, industrial machinery & equipment
 - Electric and electronic manufacturing
 - Transportation equipment
 - Instruments, miscellaneous
 - Motion picture production & sound recording

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 3.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL (CIE) EMPLOYMENT BY INDUSTRY GROUP, 1999-2008

This table presents job trends in the cultural/institutional/educational (CIE) land use category. Also included is the percentage distribution in any given year and the annual change within the CIE land use category. Figure 3.2.4 presents the job trends graphically.

Annual Average Number of Jobs

Industry Group	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Art & Recreation	14,703	15,391	10,983	10,531	10,179	10,253	10,006	9,875	10,645	10,477
Health Care	36,193	33,011	33,766	34,190	34,336	35,720	36,222	36,910	37,530	36,995
Educational Services	40,988	41,779	41,697	42,587	44,145	45,529	46,507	48,539	50,732	52,424
Social Assistance	15,659	15,915	10,658	10,788	10,854	10,964	10,439	9,876	10,138	11,117
Other CIE Services	20,068	19,970	25,118	24,158	25,369	25,495	25,553	25,446	26,316	30,835
TOTAL	127,611	126,066	122,222	122,254	124,882	127,962	128,726	130,645	135,361	141,848

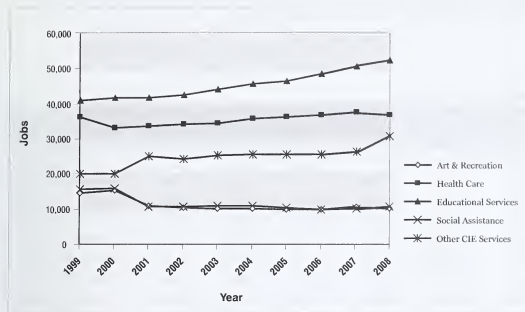
Annual Percentage Distribution

Industry Group	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Art & Recreation	11.5	12.2	9.0	8.6	8.2	8.0	7.8	7.6	7.9	7.4
Health Care	28.4	26.2	27.6	28.0	27.5	27.9	28.1	28.3	27.7	26.1
Educational Services	32.1	33.1	34.1	34.8	35.3	35.6	36.1	37.2	37.5	37.0
Social Assistance	12.3	12.6	8.7	8.8	8.7	8.6	8.1	7.6	7.5	7.8
Other CIE Services	15.7	15.8	20.6	19.8	20.3	19.9	19.9	19.5	19.4	21.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Art & Recreation	4.7	N/A	-4.1	-3.3	0.7	-2.4	-1.3	7.8	-1.6
Health Care	-8.8	N/A	1.3	0.4	4.0	1.4	1.9	1.7	-1.4
Educational Services	1.9	N/A	2.1	3.7	3.1	2.1	4.4	4.5	3.3
Social Assistance	1.6	N/A	1.2	0.6	1.0	-4.8	-5.4	2.6	9.7
Other CIE Services	-0.5	N/A	-3.8	5.0	0.5	0.2	-0.4	3.4	17.2
TOTAL	-1.2	N/A	0.0	2.1	2.5	0.6	1.5	3.6	4.8

FIGURE 3.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL EMPLOYMENT BY INDUSTRY GROUP, 1999-2008



Notes:

- Due to rounding, figures may not add to the total shown.
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Other CIE Services include:
 - Museums, historical sites, zoos, and parks
 - Membership associations and organizations
 - Private households
- Private households constitute the majority of other CIE services.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 3.3 EMPLOYMENT BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2008

This table presents the geographic distribution of jobs within San Francisco's eleven Commerce & Industry Districts, by land use category (see Section 1.2 – Data Formats for more on these districts)

Employment by Land Use Category and C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Other	Private Households*	Total
Bayview	1,803	2,360	14,043	-	1,003	819	778	20,028
Civic Center	15,759	9,507	1,176	4,965	14,489	1,216	1,139	47,110
Financial	120,157	18,183	21,709	7,150	12,440	1,602	1,171	181,241
Mission	2,721	5,281	3,770	17	2,586	1,306	1,197	17,153
North Beach	3,365	8,162	1,550	1,351	2,856	1,036	927	18,320
North Central	5,532	10,325	1,325	614	41,075	2,318	2,081	61,189
Northwest	3,971	5,990	2,618	57	8,919	1,798	1,632	23,353
South of Market	49,588	21,747	29,867	3,813	16,655	2,051	1,744	123,720
Southwest	8,343	13,861	5,024	96	17,030	4,565	4,135	48,917
Van Ness	3,975	5,507	1,432	1,238	5,345	1,260	1,178	18,757
Unclassified	6,037	2,519	2,195	16	1,681	398	357	12,846
TOTAL	221,250	103,442	84,707	19,318	125,510	18,407	16,338	572,635

Percentage Distribution by Commerce and Industry District

C&I District	Office	Retail	PDR	Hotel	CIE	Other	Private Households*	Total
Bayview	0.8	2.3	16.6	0.0	0.8	4.4	4.8	3.5
Civic Center	7.1	9.2	1.4	25.7	11.5	6.6	7.0	8.2
Financial	54.3	17.6	25.6	37.0	9.9	8.7	7.2	31.7
Mission	1.2	5.1	4.5	0.1	3.4	5.8	5.7	3.0
North Beach	1.5	7.9	1.8	7.0	2.1	7.1	7.3	3.2
North Central	2.5	10.0	1.6	3.2	32.7	12.6	12.7	10.7
Northwest	1.8	5.8	3.1	0.3	7.1	9.8	10.0	4.1
South of Market	22.4	21.0	35.3	19.7	13.3	11.1	10.7	21.6
Southwest	3.8	13.4	5.9	0.5	13.6	24.8	25.3	8.5
Van Ness	1.8	5.3	1.7	6.4	4.3	6.8	7.2	3.3
Unclassified	2.7	2.4	2.6	0.1	1.3	2.2	2.2	2.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

CONTINUED >

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Other	Private Households*	Total
Bayview	9.0	11.8	70.1	0.0	5.0	4.1	3.9	100.0
Civic Center	33.5	20.2	2.5	10.5	30.8	2.6	2.4	100.0
Financial	66.3	10.0	12.0	3.9	6.9	0.9	0.6	100.0
Mission	15.9	30.8	22.0	0.1	25.0	6.3	5.4	100.0
North Beach	18.4	44.6	8.5	7.4	14.1	7.1	6.5	100.0
North Central	9.0	16.9	2.2	1.0	67.1	3.8	3.4	100.0
Northwest	17.0	25.6	11.2	0.2	38.2	7.7	7.0	100.0
South of Market	40.1	17.6	24.1	3.1	13.5	1.7	1.4	100.0
Southwest	17.1	28.3	10.3	0.2	34.8	9.3	8.5	100.0
Van Ness	21.2	29.4	7.6	6.6	28.5	6.7	6.3	100.0
Unclassified	47.0	19.6	17.1	0.1	13.1	3.1	2.8	100.0
TOTAL	38.6	18.1	14.8	3.4	21.9	3.2	2.9	100.0

Notes:

- Private households (NAICS 814) are a subset of Other and were previously counted under the CIE land use category.
- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- See Map 1.1 for San Francisco C & I district boundaries
- Sums may be less than in Table 3.1 due to increased data suppression warranted by the smaller geographic scale of analysis.
- CIE employment numbers within each C & I district are lower for 2008 than in previous years due to the shifting of NAICS 814 (Private Households) from CIE to Other.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

4.0 ESTABLISHMENTS

This Chapter provides information about the number and distribution of establishments in San Francisco. This data is gathered from the California Employment Development Department (EDD). Prior to 2002, this data was collected from different sources (primarily the San Francisco Office of the Treasurer and Tax Collector) that utilized substantially different criteria and methodologies. Therefore, data is not presented for years prior to 2002.

This chapter reports establishment data by the locations of business, production, or operations. A single company or owner may conduct operations or services at multiple locations; each location is included. The data does not include San Francisco businesses that are exempt from paying local business tax. Government agencies and various non-profit organizations are exempt from local business tax. Businesses that fail to file taxes are also not included.

Establishment data is reported both for the entire city and the city's ten Commerce and Industry Districts by five Land Use categories - Office, Retail, Production/Distribution/Repair (PDR), Hotel, and Cultural/Institutional/Educational (CIE). For an explanation of Land Use Category and Commerce and Industry District, refer to Section 1.2 - Data Formats.

Table 4.1 shows establishment data by Land Use Category from 2002 to 2008. Tables 4.2.1 through 4.2.4 show establishment data by Industry Group within each Land Use Category in San Francisco from 2002 to 2008. Tables 4.3 and 4.4 present San Francisco establishments for 2008 in geographic context. Table 4.3 shows the distribution of establishments throughout the City data by Land Use Category type. Table 4.4 shows the distribution of establishments throughout the City data by employer size.

Both tables show a number of establishments for whom the geographical location is not known. These have been placed under an Unclassified category. This category includes home-based business establishments and organizations, such as cooks, maids, butlers, private caregivers and outside workers, such as gardeners, caretakers, and other maintenance workers. These groups do not register a physical address with the State and thus cannot be classified under a specific geographic district.

However, the number of Unclassified establishments in this year's Inventory is substantially lower than in previous years due to more accurate address reporting.

Establishments by Land Use Category

- *Table 4.1 San Francisco Establishments by Land Use Category, 2002-2008* — The number of establishments in San Francisco were at their highest level in seven years. The number of establishments increased in 2008 for the third year in a row. In addition, increases in CIE establishments more than offset establishment declines in the PDR and Hotel land use categories.
- *Table 4.2.1 Office Establishments by Industry Groups, 2002-2008* — Within Office establishments, the number of Office Services and Public Administration firms increased while all other Office industry groups showed a decrease in numbers. Overall, the number of Office establishments was higher by 1%.
- *Table 4.2.2 Retail Establishments by Industry Groups, 2002-2008* — Retail establishments increased in 2008 by 1.1% with all industry groups except Food Stores reporting higher numbers.
- *Table 4.2.3 PDR Establishments by Industry Groups, 2002-2008* — Overall, PDR establishments decreased slightly in 2008 (-0.6%). All PDR groups with the exception of Transportation and Wholesale experienced a loss in the number of firms.
- *Table 4.2.4 Cultural/Institutional/Educational Establishments by Industry Group, 2002-2008* — Overall the number CIE establishments continued to grow, increasing by close to 22%. Within CIE establishments, the source of the continued growth in both quantity and share comes from Other CIE Services, which largely consists of personal services in private households.

Establishments by Geographic District

- *Table 4.3 Establishments by Commerce and Industry District and Land Use Category, 2008* — Over 40% of all establishments are private household establishments, a subset of the Other land use category, representing jobs that are home based and are geographically spread citywide. When comparing the 2008 geographic distribution with previous Inventory reports, it should be noted that establishments previously categorized in the Unclassified Commerce and Industry district under CIE have been redistributed to the other C&I districts under the Other land use category, due to more accurate address reporting. Accordingly, the Southwest geographic area contains the largest number of establishments in 2008. More than 40% of San Francisco's Office establishments are located in the Financial district.

Establishments by Size

- *Table 4.4 Establishments by Commerce and Industry District and Establishment Size, 2008* — The vast majority of businesses (72%) have four or fewer employees. Almost a quarter of these small establishments are in the Southwest Commerce and Industry district since this is where most of the home based businesses are. Larger firms, with 50 employees or more are concentrated in the Financial and South of Market districts.

TABLE 4.1 SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2002-2008

This table contains the number of establishments in each of the five major non-residential land use categories in San Francisco. Data is presented from 2002-2008. Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 4.1.1 (a snapshot of establishment distribution in 2008) and 4.1.2 (a look at seven-year trends).

Number of Establishments

Land Use Category	2002	2003	2004	2005	2006	2007	2008
Office	11,873	11,314	10,983	10,778	11,280	11,179	11,292
Retail	7,805	7,761	7,651	7,450	7,517	7,395	7,473
PDR	5,341	5,122	4,984	4,826	4,847	4,839	4,812
Hotel	324	339	329	320	311	291	288
CIE	17,484	18,671	19,189	19,418	20,172	20,466	24,888
TOTAL	42,992	43,272	43,201	42,855	44,190	44,414	48,753

Annual Percentage Distribution

Land Use Category	2002	2003	2004	2005	2006	2007	2008
Office	27.6	26.1	25.4	25.1	25.5	25.2	23.2
Retail	18.2	17.9	17.7	17.4	17.0	16.7	15.3
PDR	12.4	11.8	11.5	11.3	11.0	10.9	9.9
Hotel	0.8	0.8	0.8	0.7	0.7	0.7	0.6
CIE	40.7	43.1	44.4	45.3	45.6	46.1	51.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Office	-4.7	-2.9	-1.9	4.7	-0.9	1.0
Retail	-0.6	-1.4	-2.6	0.9	-1.6	1.1
PDR	-4.1	-2.7	-3.2	0.4	-0.2	-0.6
Hotel	4.6	-2.9	-2.7	-2.8	-6.4	-1.0
CIE	6.8	2.8	1.2	3.9	1.5	21.6
TOTAL	0.7	-0.2	-0.8	3.1	0.5	9.8

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Totals also include some unclassified land uses

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

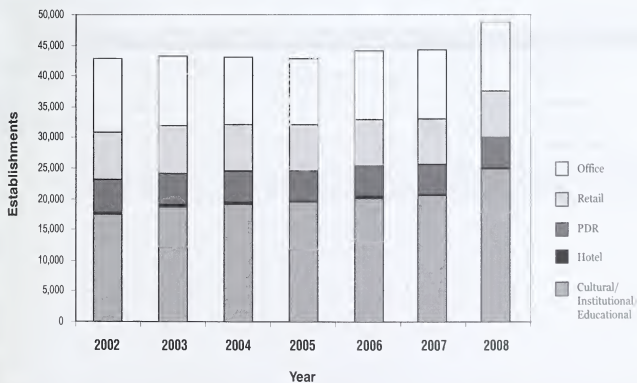
FIGURE 4.1.1 SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2008**FIGURE 4.1.2** SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2002-2008

TABLE 4.2.1 OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008

This table presents establishment trends in the office land use category. Also included is the percentage distribution in any given year and the annual change within the office land use category. Figure 4.2.1 presents the establishment trends graphically.

Number of Establishments

Industry Group	2002	2003	2004	2005	2006	2007	2008
Agriculture	29	42	41	38	37	36	34
Finance	1,494	1,485	1,455	1,438	1,464	1,455	1,436
Insurance	586	579	558	547	552	559	537
Real Estate	1,447	1,426	1,404	1,418	1,472	1,443	1,393
Office Services	7,913	7,384	7,132	6,937	7,371	7,297	7,343
Public Administration	396	393	394	401	380	384	540
TOTAL	11,865	11,307	10,983	10,778	11,275	11,173	11,283

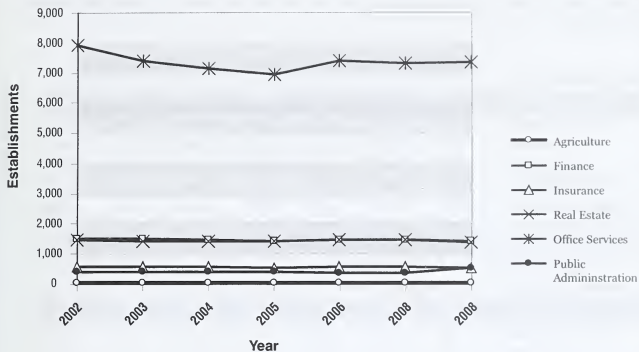
Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006	2007	2008
Agriculture	0.2	0.4	0.4	0.4	0.3	0.3	0.3
Finance	12.6	13.1	13.2	13.3	13.0	13.0	12.7
Insurance	4.9	5.1	5.1	5.1	4.9	5.0	4.8
Real Estate	12.2	12.6	12.8	13.2	13.1	12.9	12.3
Office Services	66.7	65.3	64.9	64.4	65.4	65.3	65.1
Public Administration	3.3	3.5	3.6	3.7	3.4	3.4	4.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Agriculture	44.8	-2.4	-7.9	-2.6	-1.4	-6.2
Finance	-0.6	-2.0	-1.2	1.8	-0.6	-1.3
Insurance	-1.2	-3.6	-1.9	0.9	1.2	-3.8
Real Estate	-1.5	-1.5	1.0	3.8	-2.0	-3.4
Office Services	-6.7	-3.4	-2.7	6.3	-1.0	0.6
Public Administration	-0.9	0.3	1.8	-5.2	1.2	40.5
TOTAL	-4.7	-2.9	-1.9	4.6	-0.9	1.0

FIGURE 4.2.1 OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008



Notes:

- Due to rounding, figures may not add to the total shown.
- Office Service consists of the following:
 - Management of companies and enterprises
 - Professional, scientific, and technical services
 - Administrative and support
 - Internet publishing & broadcasting
 - Internet, web search, & data processing services
 - Other information services
- Annual average includes last quarter of previous year, and first three quarters of current year.
- Sum is less than in Table 4.1 due to increased data suppression warranted by the smaller industrial scale of analysis.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 4.2.2 RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008

This table presents establishment trends in the retail land use category. Also included is the percentage distribution in any given year and the annual change within the retail land use category. Figure 4.2.2 presents the establishment trends graphically.

Number of Establishments

Industry Group	2002	2003	2004	2005	2006	2007	2008
General Merchandise	53	55	54	55	69	68	71
Food Stores	615	607	626	629	608	612	594
Apparel Stores	712	680	662	654	661	647	650
Eating & Drinking Places	2,827	2,900	2,866	2,780	2,858	2,867	2,921
Other Retail Services	2,296	2,204	2,163	2,097	2,068	1,965	1,995
Personal & Repair Services	1,301	1,256	1,280	1,235	1,255	1,237	1,242
TOTAL	7,805	7,701	7,651	7,450	7,517	7,395	7,473

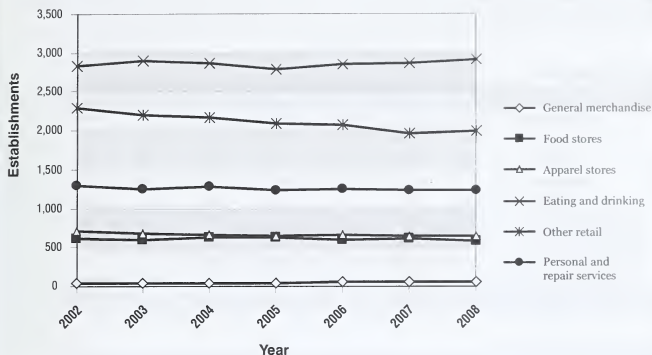
Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006	2007	2008
General Merchandise	0.7	0.7	0.7	0.7	0.9	0.9	1.0
Food Stores	7.9	7.9	8.2	8.4	8.1	8.3	7.9
Apparel Stores	9.1	8.8	8.7	8.8	8.8	8.7	8.7
Eating & Drinking Places	36.2	37.7	37.5	37.3	38.0	38.8	39.1
Other Retail Services	29.4	28.6	28.3	28.2	27.5	26.6	26.7
Personal & Repair Services	16.7	16.3	16.7	16.6	16.7	16.7	16.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
General Merchandise	3.3	-1.8	1.9	25.1	-1.1	4.8
Food Stores	-1.4	3.1	0.6	-3.4	0.6	-2.9
Apparel Stores	-4.6	-2.5	-1.2	1.0	-2.2	0.5
Eating & Drinking Places	2.6	-1.2	-3.0	2.8	0.3	1.9
Other Retail Services	-4.0	-1.9	-3.0	-1.4	-4.9	1.5
Personal & Repair Services	-3.5	1.9	-3.5	1.6	-1.4	0.4
TOTAL	-1.3	-0.6	-2.6	0.9	-1.6	1.1

FIGURE 4.2.2 RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008

**Notes:**

- Due to rounding, figures may not add to the total shown.

- Other Retail Stores include:

- Motor vehicle parts and dealers
- Electronics and appliance stores
- Furniture and home furnishings stores
- Miscellaneous retail stores
- Rental and leasing services
- Building material and garden equipment supply dealers
- Health and personal care stores
- Gasoline stations
- Sporting goods, hobby, book, and music stores
- Non-store retailers

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 4.2.3 PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008

This table presents establishment trends in the PDR land use category. Also included is the percentage distribution in any given year and the annual change within the PDR land use category. Figure 4.2.3 presents the establishment trends graphically.

Number of Establishments

Industry Group	2002	2003	2004	2005	2006	2007	2008
Construction	1,722	1,697	1,678	1,647	1,708	1,687	1,676
Transportation	562	544	517	527	502	494	503
Utilities	22	23	26	26	25	26	25
Information	235	213	202	185	187	249	249
Wholesale	1,341	1,322	1,296	1,255	1,293	1,295	1,302
Food Manufacturing	179	168	160	155	152	147	143
Apparel Manufacturing	272	242	226	206	179	168	163
Printing & Publishing	463	424	406	376	358	358	343
Other Manufacturing	546	490	468	450	446	416	410
TOTAL	5,342	5,122	4,978	4,826	4,849	4,839	4,812

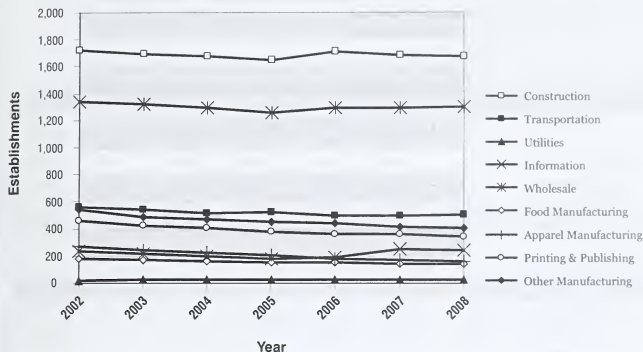
Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006	2007	2008
Construction	32.2	33.1	33.7	34.1	35.2	34.9	34.8
Transportation	10.5	10.6	10.4	10.9	10.3	10.2	10.4
Utilities	0.4	0.4	0.5	0.5	0.5	0.5	0.5
Information	4.4	4.2	4.0	3.8	3.9	5.1	5.2
Wholesale	25.1	25.8	26.0	26.0	26.7	26.8	27.1
Food Manufacturing	3.4	3.3	3.2	3.2	3.1	3.0	3.0
Apparel Manufacturing	5.1	4.7	4.5	4.3	3.7	3.5	3.4
Printing & Publishing	8.7	8.3	8.2	7.8	7.4	7.4	7.1
Other Manufacturing	10.2	9.6	9.4	9.3	9.2	8.6	8.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Construction	-1.4	-1.1	-1.8	3.7	-1.2	-0.6
Transportation	-3.2	-5.1	2.0	-4.8	-1.5	1.7
Utilities	5.0	14.3	1.0	-4.8	3.0	-2.9
Information	-9.4	-5.4	-8.2	1.1	33.2	-0.2
Wholesale	-1.4	-1.9	-3.2	3.1	0.2	0.5
Food Manufacturing	-6.1	-4.6	-3.1	-2.1	-3.1	-3.2
Apparel Manufacturing	-11.2	-6.3	-9.2	-12.9	-6.3	-3.1
Printing & Publishing	-8.4	-4.2	-7.5	-4.7	0.1	-4.3
Other Manufacturing	-10.3	-4.5	-3.7	-0.9	-6.8	-1.3
TOTAL	-4.1	-2.8	-3.1	0.5	-0.2	-0.6

FIGURE 4.2.3 PDR ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008

**Notes:**

- PDR = Production/Distribution/Repair
- Due to rounding, figures may not add to the total shown.
- Information Establishments include:
 - Broadcasting except internet
 - Telecommunications
- Other Manufacturing includes:
 - Lumber, furniture & fixtures, paper products
 - Chemicals and petroleum production
 - Rubber, leather, stone/clay/glass/concrete
 - Instruments, miscellaneous
 - Metal, industrial machinery & equipment
 - Electric and electronic manufacturing
 - Transportation equipment
 - Motion picture production & sound recording

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

**TABLE 4.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL (CIE) ESTABLISHMENTS
BY INDUSTRY GROUP, 2002-2008**

This table presents establishment trends in the cultural/institutional/educational (CIE) land use category. Also included is the percentage distribution in any given year and the annual change within the CIE land use category. Figure 4.2.4 presents the establishment trends graphically.

Number of Establishments

Industry Group	2002	2003	2004	2005	2006	2007	2008
Art & Recreation	425	412	405	402	424	424	416
Health Care	2,059	2,070	2,066	2,025	2,086	2,075	2,055
Educational Services	962	972	910	699	699	694	697
Social Assistance	546	592	595	586	574	590	600
Other CIE Services	13,491	14,625	15,209	15,706	16,389	16,684	21,122
TOTAL	17,483	18,671	19,185	19,418	20,172	20,466	24,888

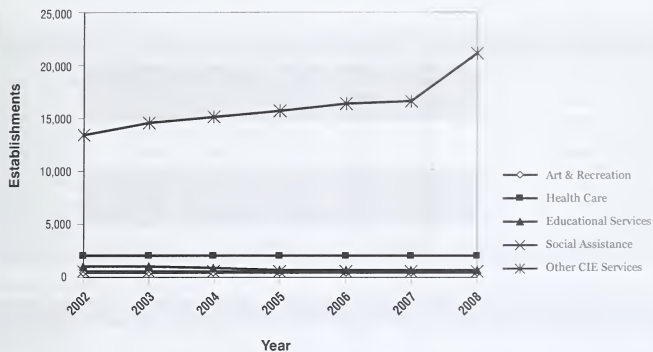
Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006	2007	2008
Art & Recreation	2.4	2.2	2.1	2.1	2.1	2.1	1.7
Health Care	11.8	11.1	10.8	10.4	10.3	10.1	8.3
Educational Services	5.5	5.2	4.7	3.6	3.5	3.4	2.8
Social Assistance	3.1	3.2	3.1	3.0	2.8	2.9	2.4
Other CIE Services	77.2	78.3	79.3	80.9	81.2	81.5	84.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Art & Recreation	-3.1	-1.7	-0.7	5.5	-0.1	-1.8
Health Care	0.5	-0.2	-2.0	3.0	-0.6	-1.0
Educational Services	1.1	-6.4	-23.2	0.0	-0.7	0.4
Social Assistance	8.5	0.4	-1.4	-2.1	2.8	1.6
Other CIE Services	8.4	4.0	3.3	4.4	1.8	26.6
TOTAL	6.8	2.8	1.2	3.9	1.5	21.6

FIGURE 4.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2008



Notes:

- Due to rounding, figures may not add to the total shown.
- Other CIE Services includes:
 - Museums, historical sites, zoos, and parks
 - Membership associations and organizations
 - Private households
- Private households constitute the majority of Other CIE services.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 4.3 ESTABLISHMENTS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2008

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts by land use category (see Section 1.2 – Data Formats for more on these Districts).

Number of Establishments

C&I District	Office	Retail	PDR	Hotel	CIE	Other	Private Households*	TOTAL
Bayview	156	235	675	2	85	1,058	1,025	2,210
Civic Center	784	463	111	54	304	1,561	1,509	3,277
Financial	4,526	1,233	730	51	763	1,396	1,106	8,698
Mission	375	506	286	5	282	1,294	1,193	2,748
North Beach	379	517	146	24	137	1,440	1,378	2,644
North Central	818	910	258	41	672	2,483	2,290	5,182
Northwest	534	549	290	7	454	2,205	1,892	3,858
South of Market	1,551	1,094	1,126	34	407	2,319	2,101	6,531
Southwest	1,301	1,353	907	21	1,140	5,622	5,265	10,344
Van Ness	532	477	112	44	322	1,556	1,486	3,042
Unclassified	338	137	172	5	91	1,025	988	1,767
TOTAL	11,292	7,473	4,812	288	4,657	21,779	20,232	50,299

Percentage Distribution by Commerce and Industry District

C&I District	Office	Retail	PDR	Hotel	CIE	Other	Private Households*	TOTAL
Bayview	1.4	3.1	14.0	0.7	1.8	4.9	5.1	4.4
Civic Center	6.9	6.2	2.3	18.7	6.5	7.2	7.5	6.5
Financial	40.1	16.5	15.2	17.8	16.4	6.4	5.5	17.3
Mission	3.3	6.8	5.9	1.7	6.1	5.9	5.9	5.5
North Beach	3.4	6.9	3.0	8.4	3.0	6.6	6.8	5.3
North Central	7.2	12.2	5.4	14.3	14.4	11.4	11.3	10.3
Northwest	4.7	7.3	6.0	2.3	9.7	9.3	9.3	7.7
South of Market	13.7	14.6	23.4	11.9	8.7	10.6	10.4	13.0
Southwest	11.5	18.1	18.9	7.2	24.5	25.8	26.0	20.6
Van Ness	4.7	6.4	2.3	15.2	6.9	7.1	7.3	6.0
Unclassified	3.0	1.8	3.6	1.7	2.0	4.7	4.9	3.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Other	Private Households*	TOTAL
Bayview	7.1	10.6	30.5	0.1	3.8	47.9	46.4	100.0
Civic Center	2.9	14.1	3.4	1.6	9.3	47.7	46.1	100.0
Financial	52.0	14.2	8.4	0.6	8.8	16.0	12.7	100.0
Mission	13.6	18.4	10.4	0.2	10.3	47.1	43.4	100.0
North Beach	14.3	19.6	5.5	0.9	5.2	54.5	52.1	100.0
North Central	15.8	17.6	5.0	0.8	13.0	47.9	44.2	100.0
Northwest	13.8	14.2	7.5	0.2	11.8	52.5	49.0	100.0
South of Market	23.8	16.8	17.2	0.5	6.2	35.5	32.2	100.0
Southwest	12.6	13.1	8.8	0.2	11.0	54.4	50.9	100.0
Van Ness	17.5	15.7	3.7	1.4	10.6	51.1	48.8	100.0
Unclassified	19.1	7.7	9.7	0.3	5.1	58.0	55.9	100.0
TOTAL	22.5	14.9	9.6	0.6	9.3	43.3	40.2	100.0

Notes:

- Private households (NAICS 814) are a subset of Other and were previously counted under the CIE land use category.
- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational
- Tables 4.2.1-4.2.4 provide detailed information of various components of Office, Retail, PDR and CIE respectively
- CIE establishment numbers within each C & I district are lower for 2008 than in previous years due to the shifting of NAICS 814 (Private Households) from CIE to Other.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 4.4 ESTABLISHMENTS BY COMMERCE & INDUSTRY DISTRICT AND SIZE CLASS, 2008

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts, by the size of the establishment (see Section 1.2 – Data Formats for more on these Districts).

Number of Employees

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	1,520	273	212	137	42	24	2	-	1	2,209
Civic Center	2,333	320	252	235	73	43	12	5	5	3,277
Financial	4,713	1,399	1,065	841	349	211	77	36	10	8,699
Mission	2,076	326	172	119	37	14	3	1	-	2,748
North Beach	2,038	257	168	113	43	20	4	0	1	2,644
North Central	4,029	502	352	194	62	32	3	2	7	5,182
Northwest	3,079	362	237	127	26	17	8	1	2	3,858
South of Market	4,161	851	673	488	192	103	35	13	15	6,531
Southwest	8,490	919	516	279	89	39	10	2	1	10,344
Van Ness	2,405	282	169	118	45	20	4	1	1	3,042
Unclassified	1,426	136	89	65	31	14	5	2	-	1,767
TOTAL	36,270	5,627	3,904	2,713	988	536	162	62	41	50,301

Percentage Distribution by C&I District

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	4.2	4.8	5.4	5.0	4.2	4.4	0.9	0.0	2.4	4.4
Civic Center	6.4	5.7	6.5	8.7	7.4	8.0	7.1	7.2	11.7	6.5
Financial	13.0	24.9	27.3	31.0	35.3	39.3	47.5	57.2	24.0	17.3
Mission	5.7	5.8	4.4	4.4	3.7	2.5	2.0	1.6	0.0	5.5
North Beach	5.6	4.6	4.3	4.2	4.3	3.8	2.7	0.5	2.0	5.3
North Central	11.1	8.9	9.0	7.1	6.3	6.0	2.0	3.2	15.9	10.3
Northwest	8.5	6.4	6.1	4.7	2.7	3.1	4.6	1.6	4.9	7.7
South of Market	11.5	15.1	17.2	18.0	19.4	19.3	21.8	20.9	35.5	13.0
Southwest	23.4	16.3	13.2	10.3	9.0	7.3	5.9	3.7	2.4	20.6
Van Ness	6.6	5.0	4.3	4.3	4.5	3.6	2.3	0.8	1.2	6.0
Unclassified	3.9	2.4	2.3	2.4	3.1	2.7	3.1	3.2	0.0	3.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Size Class

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	68.8	12.3	9.6	6.2	1.9	1.1	0.1	0.0	0.0	100.0
Civic Center	71.2	9.8	7.7	7.2	2.2	1.3	0.4	0.1	0.1	100.0
Financial	54.2	16.1	12.2	9.7	4.0	2.4	0.9	0.4	0.1	100.0
Mission	75.5	11.9	6.3	4.3	1.3	0.5	0.1	0.0	0.0	100.0
North Beach	77.1	9.7	6.4	4.3	1.6	0.8	0.2	0.0	0.0	100.0
North Central	77.8	9.7	6.8	3.7	1.2	0.6	0.1	0.0	0.1	100.0
Northwest	79.8	9.4	6.1	3.3	0.7	0.4	0.2	0.0	0.1	100.0
South of Market	63.7	13.0	10.3	7.5	2.9	1.6	0.5	0.2	0.2	100.0
Southwest	82.1	8.9	5.0	2.7	0.9	0.4	0.1	0.0	0.0	100.0
Van Ness	79.1	9.3	5.5	3.9	1.5	0.6	0.1	0.0	0.0	100.0
Unclassified	80.7	7.7	5.0	3.6	1.7	0.8	0.3	0.1	0.0	100.0
TOTAL	72.1	11.2	7.8	5.4	2.0	1.1	0.3	0.1	0.1	100.0

Notes:

- Due to rounding, figures may not add to the total shown.
- There are more establishments within each C & I district for 2008 than in previous years due to more accurate address reporting. This is particularly noticeable in the 0-4 size class.
- These establishments were previously counted in the Unclassified C & I district.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

5.0 MONETARY TRANSACTIONS

This chapter presents information about trends in monetary transactions that occur in San Francisco. While the Employment and Establishments chapters provide information regarding the quantity and growth of jobs and establishments in San Francisco, this chapter supplies complementary information regarding the city's economic prosperity in monetary terms. The chapter is divided into three sections, each relating to a key source of revenue in the city's economy such as annual wages, retail sales and permits, and government revenues.

Section 5.1 describes total annual wages received by individuals for work in San Francisco from 1999 to 2008, using data supplied by the California Employment Development Department (EDD). Section 5.2 presents the State Board of Equalization's data on San Francisco's taxable retail sales and sales tax permits in 2008. Section 5.3 reports city government revenues and expenditures in fiscal year 2008 (July 1, 2007 to June 30, 2008). This data is obtained

from the City Controller's office. The tables in each section report each indicator's quantity in specific units and annual percentage distribution.

Previous C&I inventories from 1987-2000 also reported businesses' gross receipts by Commerce & Industry District. Since 2001, this data is no longer reported; as of May 25, 2001, the San Francisco Board of Supervisors repealed the gross receipts business tax.

Nominal or current dollars reported for a specified period of time have been adjusted for inflation to obtain constant dollars. The adjustments have been made to control for inflated monetary values, thus enabling better measurement of an indicator's economic performance over time. The adjustments have been made by dividing nominal or current values by the Consumer Price Index (CPI) provided by the United States Department of Labor, Bureau of Labor Statistics.

5.1 WAGES BY LAND USE CATEGORY

This section describes total annual earnings received by persons for work in San Francisco from 1999 to 2008. Persons who received wages include workers who commute into the city and San Francisco residents employed in the city. The California Employment Development Department (EDD) prepares the measure of total annual wages. It includes each employee's total wages as reported by businesses in their payroll records. The earnings of sole proprietors are not reported in these data. Total annual wages are presented in thousands of dollars, annual percentage distribution, and percentage change.

This section complements Chapter 3, Employment. The employment and wages data in this inventory are derived from the same source, and are organized by Land Use Category. For an explanation of the Land Use Categories and C&I Districts, refer to Section 1.2 - Data Formats.

From 1998 through 2000, these were organized according to Standard Industrial Classification System (SIC). Since 2001, Land Use categories are organized according to North American Industry Classification system (NAICS). Both industry classification systems are discussed in Section 1.2 - Data Formats. Table 1.2 in Chapter 1 shows the closest match between SIC and NAICS land use categories. It is not possible to get a 100% match, because under the NAICS, certain industries have been moved from one Land Use Category to another.

- *Table 5.1.1 Total Annual Wages by Land Use Activity, 1999–2008* — Total annual wages continued to rise in 2008, reaching their highest level since 2000, after adjusting for inflation. This increase in annual wages was highest in Hotel (5%) and CIE (4%).
- *Table 5.1.2 Annual Wages per Worker by Land Use Activity, 1999–2008* — All sectors, except for Hotel workers, saw their wages fall, on average, 2.2%. Office workers by far earned the most, averaging \$115,460 annually in 2008, while Retail workers earned the least at an average of \$31,260.

5.2 TAXABLE SALES AND PERMITS

Section 5.2 reports taxable sales in retail stores and the number of sales tax permits issued for retail stores located in San Francisco from 1999 to 2008. Taxable sales and permits in California are reported by the California State Board of Equalization (SBE). Taxable sales revenues and sales tax permits issued for outlets that are not retail stores, including business and personal services, have not been included. Such outlets include the following: non-store retailers (vending machines, sales by telephone), public utilities, government agencies, educational institutions, health services, and advertising agencies.

Taxable sales are measured by transactions subject to sales and use tax, and are reported by type of business for all cities and counties in California on a quarterly basis. Businesses are classified by the SBE according to their principal line of merchandise or service. Taxable sales are reported by type of business, but cannot be broken down by commodity. Those data do not include sales that are not subject to sales or use tax, such as food for home consumption, prescription medicine, sales for resale, and taxable sales disclosed by board audits.

The number of sales tax permits represents the number of businesses operated by all manufacturers, wholesalers, and retailers of tangible personal property, except those dealing in non-taxable commodities. Permits are tabulated semi-annually on January 1 and July 1.

- *Table 5.2.1 Taxable Retail Sales and All Outlet Sales, 1999–2008* — Taxable sales at Retail Stores decreased slightly in 2008 (-0.2%) However, sales at All Outlets continued to increase – a trend which started in 2003. Still, sales activities have yet to recapture levels recorded in 2000.
- *Table 5.2.2 Taxable Retail Sales & Sales Tax Permits by Type of Outlet, 2008* — The Other Retail Stores category accounts for 44% of the Retail Stores sales tax permits and 24% of retail taxable sales. Eating and Drinking establishments make up 25% of Retail Stores sales tax permits but 27% of the retail taxable sales. Service Stations have the highest sales per establishment at just over \$5.4 million followed by General Merchandise stores which average almost \$2.9 million.

5.3 CITY REVENUES AND EXPENDITURES

Section 5.3 presents San Francisco city government revenues and expenditures for fiscal year 2007-2008. The fiscal year ends on June 30th. The data in this subsection is from the Comprehensive Annual Financial Report, prepared by the San Francisco Controller's Office. This data covers the general fund, special revenue funds, and debt service funds. Table 5.3.1 describes general governmental revenues by source. Table 5.3.2 describes general governmental expenditures by major function.

The general fund accounts for resources that are not required to be accounted for in other funds. Special revenue funds are used to account for the proceeds of a specific revenue source, other than expendable trusts or major capital projects, which are legally restricted to expenditures for specified purposes. Now included in the general fund are two major funds/activities that were previously accounted for in special revenue funds: hotel tax and work order funds. All other previous special revenue funds remain in the new fund structure as special revenue funds. The debt service funds account for the accumulation of property taxes and other revenue for periodic payment of interest and principal on general obligation and lease revenue bonds and related authorized costs. There are no changes in the fund structure of this fund type.

Other city funds not included are capital project funds, proprietary fund types, and fiduciary fund types. Proprietary funds consist of enterprise and internal service funds. Fiduciary funds consist of pension trust, non-expendable trust funds, and expendable trust funds.

Table 5.3.1 general governmental revenues are presented by major source while Table 5.3.2 presents them by government function for fiscal year 2007-08. Major revenue sources are property taxes; business taxes; other local taxes; licenses, fines and penalties; interest and investment income; rents and concessions; intergovernmental; and charges for services. The major functions of general governmental expenditures include public protection; public works, transportation, and commerce; human welfare and neighborhood development; community health; culture and recreation; general administration and finance; debt service; and capital outlay.

- *Table 5.3.1 San Francisco Government General Revenue by Source, Fiscal Year 2008* — Property Taxes and Intergovernmental Transfers were the primary sources of revenue for San Francisco, accounting for 32% and 25% respectively. Other significant sources of San Francisco government revenues were Other Local Taxes (18%) and Business Taxes (11%).
- *Table 5.3.2 San Francisco Government General Expenditures by Function, Fiscal Year 2008* — Public Protection, Human Welfare / Neighborhood Development, and Community Health functions were the largest recipients of San Francisco government expenditures in Fiscal Year 2008 accounting for 26%, 23%, and 15% respectively.

TABLE 5.1.1 TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 1999-2008

This table contains the amount of wages paid to workers in each of the five major non-residential land use categories in San Francisco. Data is presented from 1999-2008, although the 2001 switch in classification systems from SIC to NAICS means that it is inappropriate to directly compare between 1999-2000 data and 2001-2008 data (see Section 1.2 - Data Formats for a description of land use categories and an SIC-NAICS discussion). Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 5.1.1 (a snapshot of job distribution in 2008) and 5.1.2 (a look at ten-year trends).

Nominal - Non-Adjusted for Inflation (\$ 000s)

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Office	\$17,567,000	\$20,739,473	\$21,199,248	\$18,033,855	\$17,219,114	\$17,619,077	\$19,229,061	\$22,250,471	\$24,711,750	\$25,544,356
Retail	\$2,561,000	\$3,114,529	\$2,799,088	\$2,658,388	\$2,650,198	\$2,664,799	\$2,841,746	\$2,942,479	\$3,210,333	\$3,233,372
PDR	\$6,436,000	\$6,420,260	\$6,225,883	\$5,646,816	\$5,536,894	\$5,550,080	\$5,550,920	\$5,753,421	\$6,340,182	\$6,319,130
Hotel	\$536,000	\$557,887	\$500,105	\$500,105	\$538,418	\$584,876	\$613,242	\$671,000	\$704,872	\$764,622
CIE	\$4,248,000	\$4,310,301	\$5,094,812	\$5,177,070	\$5,403,197	\$5,558,781	\$5,911,782	\$6,380,066	\$6,817,418	\$7,325,473
TOTAL	\$31,369,029	\$35,143,450	\$35,880,136	\$32,019,082	\$31,347,821	\$31,977,613	\$34,149,206	\$37,998,504	\$41,805,696	\$43,316,200

Inflation-Adjusted (2008 \$ 000s)

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Office	\$22,932,418	\$25,975,198	\$25,416,510	\$20,517,000	\$19,275,415	\$19,381,702	\$20,897,385	\$23,715,667	\$25,520,670	\$25,544,356
Retail	\$3,369,304	\$3,900,799	\$3,355,923	\$3,024,431	\$2,966,684	\$2,931,387	\$3,088,298	\$3,136,245	\$3,315,420	\$3,233,372
PDR	\$8,401,722	\$8,041,068	\$7,464,426	\$6,423,208	\$6,198,109	\$6,105,315	\$6,032,521	\$6,132,290	\$6,547,723	\$6,319,130
Hotel	\$699,708	\$698,727	\$647,029	\$568,966	\$602,715	\$643,388	\$666,447	\$715,186	\$727,946	\$764,622
CIE	\$5,545,450	\$5,398,446	\$6,108,345	\$5,889,919	\$6,048,445	\$6,114,886	\$6,424,692	\$6,800,200	\$7,040,581	\$7,325,473
TOTAL	\$40,949,945	\$44,015,490	\$43,017,933	\$36,427,902	\$35,091,368	\$35,176,677	\$37,112,011	\$40,500,744	\$43,174,173	\$43,316,200

Annual Percentage Distribution

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Office	56.0	59.0	59.1	56.3	54.9	55.1	56.3	58.6	59.1	59.0
Retail	8.2	8.9	7.8	8.3	8.5	8.3	8.3	7.7	7.7	7.5
PDR	20.5	18.3	17.4	17.6	17.7	17.4	16.3	15.1	15.2	14.6
Hotel	1.7	1.6	1.5	1.6	1.7	1.8	1.8	1.8	1.7	1.8
CIE	13.5	12.3	14.2	16.2	17.2	17.4	17.3	16.8	16.3	16.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Office	13.3	N/A	-19.3	-6.1	0.6	7.8	13.5	7.6	0.1
Retail	15.8	N/A	-9.9	-1.9	-1.2	5.4	1.6	5.7	-2.5
PDR	-4.3	N/A	-13.9	-3.5	-1.5	-1.5	1.7	6.8	-3.5
Hotel	-0.1	N/A	-12.1	5.9	6.7	3.6	7.3	1.8	5.0
CIE	-2.7	N/A	-3.6	2.7	1.1	5.1	5.8	3.5	4.0
TOTAL	7.5	N/A	-15.3	-3.7	0.2	5.5	9.1	6.6	0.3

Notes:

- Due to rounding, figures may not add to the total shown.
- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- CFI-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

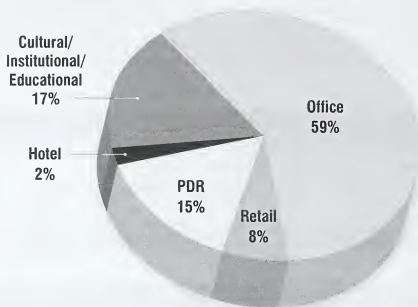
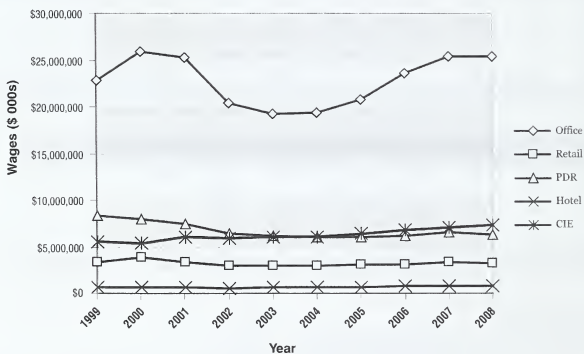
FIGURE 5.1.1 TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2008**FIGURE 5.1.2 TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 1999-2008**

TABLE 5.1.2 ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 1999-2008

This table conveys the change in pay per worker. It is based on the wages (Table 5.1.1) and employment data (Table 3.1) previously presented in this document. This information is shown graphically in Figure 5.1.3.

Wages per Worker (2008 \$)

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Office	\$100,017	\$106,766	\$107,261	\$95,958	\$95,663	\$100,330	\$106,881	\$114,973	\$118,888	\$115,455
Retail	\$34,678	\$37,686	\$33,062	\$31,321	\$31,033	\$30,855	\$32,159	\$31,907	\$32,424	\$31,258
PDR	\$71,451	\$68,998	\$69,220	\$65,637	\$66,130	\$68,571	\$71,228	\$75,060	\$77,045	\$74,597
Hotel	\$35,842	\$37,044	\$36,022	\$34,531	\$34,563	\$35,566	\$36,173	\$37,470	\$38,172	\$39,157
CIE	\$43,456	\$42,822	\$49,977	\$48,178	\$48,433	\$47,787	\$49,910	\$52,051	\$52,013	\$51,643
TOTAL	\$69,270	\$72,362	\$73,349	\$66,600	\$65,821	\$67,224	\$70,906	\$75,562	\$77,605	\$75,890

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06	2006-07	2007-08
Office	6.7	N/A	-10.5	-0.3	4.9	6.5	7.6	3.4	-2.9
Retail	8.7	N/A	-5.3	-0.9	-0.6	4.2	-0.8	1.6	-3.6
PDR	-3.4	N/A	-5.2	0.8	3.7	3.9	5.4	2.6	-3.2
Hotel	3.4	N/A	-4.1	0.1	2.9	1.7	3.6	1.9	2.6
CIE	-1.5	N/A	-3.6	0.5	-1.3	4.4	4.3	-0.1	-0.7
TOTAL	4.5	N/A	-9.2	-1.2	2.1	5.5	6.6	2.7	-2.2

Note:

• N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.

• PDR = Production/Distribution/Repair
• CIE = Cultural/Institutional/Educational

Sources:

- Employees from Table 3.1 of this report
- Wages from Table 5.1.1 of this report

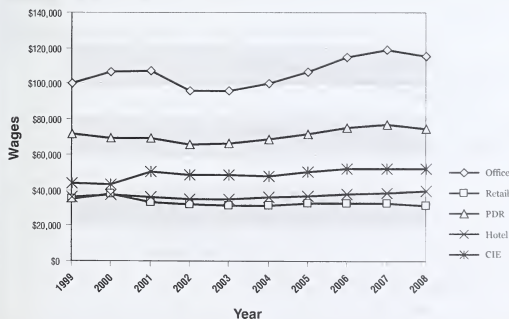
FIGURE 5.1.3 ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 1999-2008

TABLE 5.2.1 TAXABLE RETAIL SALES AND ALL OUTLET SALES, 1999-2008

This table conveys taxable sales in San Francisco from 1999-2008. The first table shows the amount of dollars as recorded each year, and the second shows this amount adjusted to reflect inflation. This information is presented graphically in Figure 5.2.1.

Nominal - Non-Adjusted for Inflation (\$ 000s)

Type of Sales	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
All Retail Sales	\$7,678,089	\$8,750,456	\$7,990,386	\$7,641,958	\$7,767,688	\$8,414,781	\$9,049,788	\$9,588,520	\$10,006,572	\$10,292,931
All Outlets	\$12,338,760	\$14,089,926	\$12,455,236	\$11,589,440	\$11,496,746	\$12,207,507	\$13,025,974	\$13,892,188	\$14,617,736	\$15,247,823

Inflation-Adjusted (2008 \$ 000s)

Type of Sales	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
All Retail Sales	\$9,915,506	\$10,817,496	\$9,373,324	\$8,820,601	\$8,809,378	\$9,429,253	\$9,945,704	\$10,210,353	\$10,317,772	\$10,292,931
All Outlets	\$15,934,310	\$17,418,261	\$14,610,930	\$13,376,916	\$13,040,202	\$13,679,224	\$14,315,526	\$14,793,122	\$15,069,248	\$15,247,823

Note:

- 2008 data only available for January to June. Full year estimated by doubling and adjusting by average ratio of January-June to July-December sales based on existing 1999-2007 data.

Sources:

- California State Board of Equalization, Taxable Sales in California; <http://www.boe.ca.gov/news/salescon07.htm>
- CPI-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics
- Additional calculations by the San Francisco Planning Department

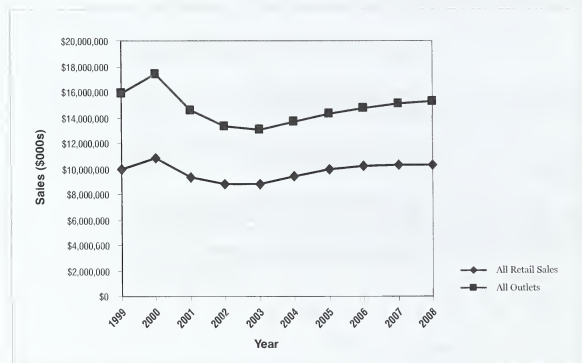
FIGURE 5.2.1 TAXABLE RETAIL SALES AND ALL OUTLET SALES, 1999-2008

TABLE 5.2.2 TAXABLE RETAIL SALES & SALES TAX PERMITS BY TYPE OF OUTLET, 2008

This table looks more closely at the type of retail sales that occurred in 2008, as well as the number of sales permits issued in that time.

Type of Retail Sales	Sales Tax Permits	Taxable Sales Transactions (\$ 000s)
Apparel Stores	1,678	\$1,022,504
General Merchandise	448	\$1,288,121
Food Stores	1,068	\$517,681
Eating & Drinking	4,046	\$2,803,277
Home Furnishings & Appliances	1,074	\$621,255
Building Materials and Farm Implements	244	\$467,573
Service Stations	130	\$702,417
Automotive Dealers and Supplies	250	\$450,920
Other Retail Stores	7,022	\$2,419,185
Total Retail Stores	15,960	\$10,292,931
Total Outlets	28,522	\$15,247,823

Notes:

- 2008 data only available for January to June. Full year estimated by doubling and adjusting by average ratio of January-June to July-December sales based on existing 1999-2007 data.
- Other Retail Stores include:
 - Packaged liquor stores
 - Second hand merchandise
 - Farm and garden supply stores
 - Fuel and ice dealers
 - Mobile homes, trailers, and campers
 - Boat, motorcycle, and plane dealers
 - Specialty store group
- In other derivations of BOE data all their retail stores includes farm implements.

Sources:

- California State Board of Equalization, Taxable Sales in California; <http://www.boe.ca.gov/news/salescont08.htm>
- Additional calculations by the San Francisco Planning Department

TABLE 5.3.1 SAN FRANCISCO GOVERNMENT GENERAL REVENUE BY SOURCE, FISCAL YEAR 2008

Table 5.3.1 conveys the expenditures by the City and County of San Francisco in Fiscal Year 2008. This data is shown graphically in Figure 5.3.2.

Revenue Source	Amount (\$ 000s)	Percentage Distribution
Property Taxes	\$1,179,864	32.1
Business Taxes	\$396,025	10.8
Other Local Taxes	\$652,971	17.8
Licenses, Permits, Fines & Penalties	\$44,160	1.2
Interest & Investment Income	\$54,256	1.5
Rents & Concessions	\$70,160	1.9
Intergovernmental	\$905,317	24.7
<i>Federal -</i>	\$328,315	8.9
<i>State -</i>	\$561,095	15.3
<i>Other -</i>	\$15,907	0.4
Charges for Services	\$288,689	7.9
Other	\$81,321	2.2
TOTAL	\$3,672,587	100.0

Note:

- Fiscal Year 2008 runs from July 1, 2007 to June 30 2008

Source:

- San Francisco Controller, Comprehensive Annual Financial Report
http://www.sfgov.org/site/uploadedfiles/controller/reports/CAFR/08/CAFR_2008.pdf

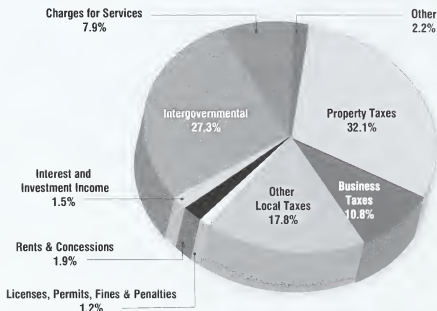
FIGURE 5.3.1 SAN FRANCISCO GOVERNMENT GENERAL REVENUE BY SOURCE, FISCAL YEAR 2008

TABLE 5.3.2 SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2008

Table 5.3.1 conveys the revenues for the City and County of San Francisco in Fiscal Year 2008. This data is shown graphically in Figure 5.3.1.

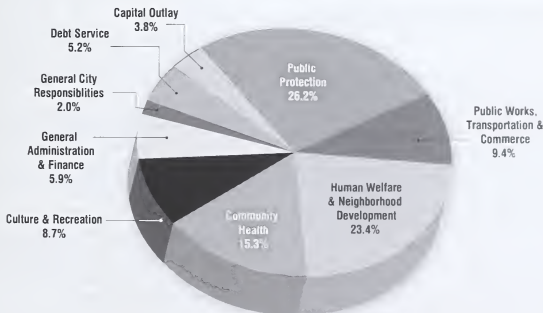
Expenditure Function	Amount (\$ 000s)	Percentage Distribution
Public Protection	\$927,198	26.2
Public Works, Transportation & Commerce	\$332,171	9.4
Human Welfare & Neighborhood Development	\$828,903	23.4
Community Health	\$543,046	15.3
Culture & Recreation	\$309,612	8.7
General Administration & Finance	\$210,466	5.9
General City Responsibilities	\$71,205	2.0
Debt Service	\$183,514	5.2
Capital Outlay	\$133,155	3.8
TOTAL	\$3,539,270	100.0

Note:

- Fiscal Year 2008 runs from July 1, 2007 to June 30, 2008

Source:

- San Francisco Controller, Comprehensive Annual Financial Report.
http://www.sfgov.org/site/uploadedfiles/controller/reports/CAFR/08/CAFR_2008.pdf

FIGURE 5.3.2 SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2008

6.0 BUILDING AND LAND USE

The tables and graphs in this chapter present information about building permit applications for 1999 through 2008, as well as land use data for 2008. Building permit applications are filed at the City and County of San Francisco Department of Building Inspection (DBI) for construction of new buildings, demolitions, and alterations to existing structures. The number of permits, status of applications, and cost of projects are measures of construction activity in San Francisco. All information for this section was provided by DBI and has been reviewed and tabulated by Planning Department staff.

6.1 BUILDING

The discussion of building in San Francisco is presented in five sections.

Sections 6.1 and 6.2. Data are reported by the year that a project was filed with the Department of Building Inspection. In past Commerce & Industry Inventories, these tables were presented by Certificate of Final Completion, a later stage in the permit process. Certificates of Final Completion have proven difficult to track accurately. All applications filed may not ultimately lead to completed projects, but trends in the number of building permit applications filed are an important economic indicator. In Section 6.1, data are reported by Land Use Category; in Section 6.2, these data are reported by Commerce and Industry (C&I) District. For further information on Land Use Categories and C&I Districts, refer to

the Data Formats section in Chapter 1. Tables in these sections are subdivided into three groups: all building permits, building permits for new construction activity, and building permits for alterations and demolitions. In turn, each group contains tables that report information on permits, total construction cost, and average construction cost by year, land use and C&I District. Annual percentage distributions and annual percentage changes are reported for numbers of permit applications and total construction costs. Construction cost values are adjusted for inflation using Saylor Inc.'s "Materials/Labor Cost Index for Construction," where 1983 is designated as the base year.

- *Table 6.1.1.A All Building Permits by Land Use Category, 1999-2008* — The number of building permits fell by 7.5% in 2008. The Residential land use category, which accounts for more than 70% of all building permits, decreased 8.6%
- *Table 6.1.1.B Total Construction Costs for All Building Permits by Land Use Category, 1999-2008* — Total construction costs decreased more than 35% in 2008. These drops occurred in all land use categories with the exception of CIE costs, which increased 10%.
- *Table 6.1.1.C Average Construction Costs for All Building Permits by Land Use Category, 1999-2008* — Average construction costs decreased in 2008 for the third year in a row.

- *Table 6.1.2.A Building Permits for New Construction by Land Use Category, 1999-2008* — The number of building permits for new construction decreased about 29% in 2008. The biggest category decline was for CIE permits (54%). Residential, which accounts for over 75% of all new construction permits, decreased by almost a third. However, the number of new construction projects in the PDR category rose by almost 86%.
- *Table 6.1.2.B Total Construction Costs for New Construction by Land Use Category, 1999-2008* — Total new construction costs decreased substantially in 2008 for the third year in a row, almost entirely driven by a decrease in residential permitting activity.
- *Table 6.1.2.C Average Construction Costs for New Construction by Land Use Category, 1999-2008* — Average new construction costs fell more than 20% in 2008. As stated earlier, it is difficult to discern a trend given the varied nature of the permitting process.
- *Table 6.1.3.A Building Permits for Alterations and Demolitions by Land Use Category, 1999-2008* — The number of permits for alterations and demolitions decreased moderately (-7.3%) in 2008 after having remained largely constant for a number of years. This decrease can be attributed to drops in the two largest categories of alteration and demolition permits – Residential (-8.4%) and Office (-13.2%).
- *Table 6.1.3.B Total Construction Costs for Alterations and Demolitions by Land Use Category, 1999-2008* — Total construction costs for alterations and demolitions fell almost 28% in 2008. The largest actual and percentage decreases occurred in the Office land use category.
- *Table 6.1.3.C Average Construction Costs for Alterations and Demolitions by Land Use Category, 1999-2008* — Average construction costs for demolitions and alterations fell in every land use category in 2008.
- *Table 6.2.1.A All Building Permits by Commerce & Industry District, 1999-2008* — There was little change in the distribution of permits by district over the past four years. Every C&I district with the exception of the Northwest and Mission experienced decreases in building permits in 2008. The Southwest district is by far the most active C&I district for permit activity, consistently accounting for at least a third of all permits.
- *Table 6.2.1.B Total Construction Costs for All Building Permits by Commerce & Industry District, 1999-2008* — Overall construction costs declined by 33% from 2007 to 2008. The Financial and South of Market districts continued to have the highest share in the distribution of construction costs.
- *Table 6.2.1.C Average Construction Costs for All Building Permits by Commerce & Industry District, 1999-2008* — Average construction cost fluctuates greatly by year and C&I district, which is not atypical. Given this, it is difficult to assess any patterns. Citywide, the average permit cost was lower in 2008 by 27.6%.
- *Table 6.2.2.A Building Permits for New Construction by Commerce & Industry District, 1999-2008* — Overall, permits for new construction decreased more than 29% between 2007 and 2008. These permit drops were seen in every district except the Bayview and Civic Center where there was a slight increase in new construction permits in 2008. New construction in the Mission district was down some 74%.
- *Table 6.2.2.B Total Construction Costs for New Construction by Commerce & Industry District, 1999-2008* — There was substantial changes by district in the cost for new construction between 2007 and 2008, as every district posted at least double-digit changes. This is not atypical of new construction costs. Overall new construction costs declined by 20.5% from 2007 to 2008.

- *Table 6.2.2.C Average Construction Costs for New Construction by Commerce & Industry District, 1999-2008* — Given the fluctuations in total construction cost, the fluctuation in average cost is to be expected. Citywide, the average cost of permits for new construction decreased by 20.5% between 2007 and 2008.
- *Table 6.2.3.A Building Permits for Alterations and Demolitions by Commerce & Industry District, 1999-2008* — Citywide, permits for alterations and demolitions fell by 7.3%. Geographic distribution of permits for alterations or demolitions is largely consistent with previous years. The largest decreases in actual permits occurred in the Southwest, Financial, and North Central districts.
- *Table 6.2.3.B Total Construction Costs for Alterations and Demolitions by Commerce & Industry District, 1999-2008* — Just as the number of permits for alterations and demolitions varied through the years for most districts, so did total construction costs. As in previous years, the Financial, Southwest, and South of Market districts reported the most total construction costs.
- *Table 6.2.3.C Average Construction Costs for Alterations and Demolitions by Commerce & Industry District, 1999-2008* — Like total costs, average costs also fluctuated from 2007 to 2008 for most districts. Overall, the average construction costs for alterations and demolitions were down almost 22%.

Section 6.3. Permit and construction cost data are cross-tabulated by Land Use Category and C&I District. This section includes all permit applications filed in 2008.

- *Table 6.3.A Permit Applications by Commerce & Industry District and Land Use Category, 2008* — The Residential land use category is by far the largest generator of building permits, accounting for 70.3% of all permits in 2008. The Southwest district generated 43.1% of the Residential permits. Almost two-thirds of all Office permits were for projects located in the Financial district.

Retail permit activity was highest in the South of Market district (20.2%). Most PDR permit applications tended to be for projects in the South of Market (42.1%) and Bayview (22.6%) districts. About 30% of Hotel permits were located in the Civic Center district. CIE permits tended to be more widely distributed among the C&I districts.

- *Table 6.3.B Total Construction Costs of All Permits by Commerce & Industry District and Land Use Category, 2008* — Construction costs for office permits were greatest in the Financial (48.2%) and South of Market (40.2%) districts. The Southwest, North Central, and Financial districts accounted for the highest percentage of residential construction costs, accounting for 28.5%, 20.3%, and 14.2% respectively. The majority of retail construction spending occurred in the South of Market (49.1%) and Financial (19.9%) districts. CIE permit costs were highest in the Southwest (28.9%) districts, while Hotel permit spending was highest in the Financial district (49.2%). Construction spending for PDR was overwhelming concentrated in the South of Market district (63.7%)
- *Table 6.3.C Average Construction Costs of All Permits by Commerce & Industry District and Land Use Category, 2008* — Average construction costs were highest for CIE, Office, and Hotel permits at \$191,100, \$134,900 and \$125,100 respectively. Among the districts, average construction costs were highest for the Financial district (\$170,000).

Section 6.4 describes permit applications by application status by Land Use Category and then by C&I District for 2008. These permit status categories are grouped into the following five major categories: building permit applications which were approved for construction; whether or not a permit has been issued; building permit applications which were canceled, including applications which have been withdrawn, revoked or disapproved; building permit applications where the authorized work has been completed; and other, which includes applications which have not yet been acted upon, have been abandoned, reinstated, appealed, or for which no information is available.

- *Table 6.4.1.A All Building Permits by Land Use Category and Permit Status, 2008* — Residential permits accounted for the majority of permits, making up more than 70% in both the Completed and Issued categories and in total permits. Almost all Building permits were concentrated in either the Completed (55.9%) or Issued (37.4%) permit status category.
- *Table 6.4.1.B Total Construction Costs of All Building Permits by Land Use Category and Permit Status, 2008* — Almost all of all construction costs were in the Issued (36.6%), Other (31.8%), or Completed (29.6%) permit status. Almost 46% of Completed construction costs were in the Office land use category. Close to half (45.9%) of Issued construction costs and 56% of Other construction costs were in the Residential land use category in 2008 indicating that a great deal of housing development was both under construction and in the pipeline at that time.
- *Table 6.4.1.C Average Construction Costs of All Permits by Land Use Category and Permit Status, 2008* — Generally, the average construction costs for permits in the Approved and Other categories were considerably higher than those in other categories. This disparity may be the result of the increased costs of building materials (concrete, lumber, steel, etc.) associated with those permits filed more recently and still under review. The most expensive average construction cost was for Office projects in the Other category where the average cost was over \$1,051,000.
- *Table 6.4.2.A All Building Permits by Commerce & Industry District and Permit Status, 2008* — About a third of both Completed and Issued permits were in the Southwest district. The Financial district had the next highest percentage of permits that were completed (14.8%) while the North Central district had the next highest percentage of Issued permits (14.5%).
- *Table 6.4.2.B Total Construction Costs of All Building Permits by Commerce & Industry District and Permit Status, 2008* — The Financial district had the highest share of total construction costs for completed projects (39.3%) followed by Southwest (17.1%) and South of Market (13.2%).

Issued permit construction costs were highest in the North Central (21.7%), Financial (20.7%), and South of Market districts (20.6%). Construction costs for projects in the Other category were concentrated in the South of Market (35.3%) and Financial (22.6%) districts.

- *Table 6.4.2.C Average Construction Costs of All Permits by Commerce & Industry District and Permit Status, 2008* — Average construction costs for Issued permits generally tended to be higher than Completed projects, and projects in the Other category were higher still than those in the Issued category. Once again, the rising cost of construction materials and other components associated with construction may be behind these disparities. Of particular note are the very high average construction costs for projects in the Other category for both the South of Market and Financial districts indicating that there may be some very large projects currently in the pipeline.

The construction cost data reported in these tables are the estimated construction cost for each project, as reported by DBI. Total and average construction cost measure the scope, complexity, and extent of construction activity in San Francisco. While total construction cost indicates the size and complexity of construction activity in San Francisco for a particular year, average construction cost relates number of applications to total construction cost, allowing for consideration of construction cost per building permit application. Construction cost values are adjusted for inflation using Saylor Inc.'s *Materials/Labor Cost Index for Construction*, where 1983 is designated as the base year (1983=100).

Section 6.5 reports total office space in San Francisco from 1999 to 2008. It includes absolute numbers as well as percentage changes over time. These data do not come from DBI, but rather from Cushman & Wakefield realtors.

- *Table 6.5 Total Existing Office Space in Central and Non-Central Business Districts, 1999-2008* — Total office space increased 3.4% between 2007 and 2008, the largest gain since 2001-2002. The rate of growth outside the Central Business District surpassed that of the Central Business District.

6.2 LAND USE

Section 6.6 reports land use activity in San Francisco. Land use, for this section, is determined by incorporating both the business type on the parcel and the location of that parcel. Business data are culled from the Dun & Bradstreet databases. Dun & Bradstreet is a firm that conducts national surveys of existing businesses, gathering information which includes number of employees, square footage of businesses, and an industry classification system which best classifies those businesses. A parcel has to have 80% or more of its usable building space occupied by one specific land use in order to warrant that particular land use classification. Less than 80% in any one land use results in a Mixed Uses designation. If either the Planning Department or the Department of Building Inspection has a record of a residence on a lot, it is determined to be of a Residential land use. If a lot contains a residence and a business establishment, that lot is classified as Mixed Residential.

Land Use is also determined by the location of a given parcel. The impact of location on land use classification is illustrated by the following example. If an establishment with a NAICS (North American Industry Classification System) code of 236 (Construction) is in the Financial District, it will be classified as Office use. If an establishment with the same NAICS code is located in South of Market or Bayview districts, it will be classified as PDR. Construction is generally considered part of the PDR land use classification. In the above scenario, however, the Financial District location of a construction business indicates that the business is conducting management, information, or professional services in more of an office setting and should therefore be assigned an Office land use classification.

The NAICS code for land uses under Office, Retail, PDR, Hotel, and Cultural/Institutional/ Educational (CIE) land use categories are noted in Table 1.2, Chapter 1. The Residential land use category data are gathered from Housing Inventory and the Department of Building Inspection's Permit Tracking System. Vacant sites data are gathered from information supplied by the Assessor's Office. Table 6.6 provides details on the amount of square footage for each land use, as a predominant use on each parcel of land, in 21 distinct plan areas in San Francisco. Map 6.6 shows the location of the plan areas. Table 6.6 is based on the information available in year 2008.

Note the following section is to be revised pending Aksel's latest land use calculations.

- *Table 6.6 Land Use Square Footage by Plan Area, 2008* — Not including streets or freeways, San Francisco has just over a billion square feet of land area. Residential is the largest single land use category accounting for 40.5% of land area in San Francisco followed by public land and open space with 25.9%.

Of the 21 plan areas, most of the land area (64.2%) can be found in the Rest of the City area. Otherwise, only the Bayview (7.1%) and the Presidio (6.3%) constitute sizable portions of land area.

The Bayview plan area has the most PDR (38.1%) land in the city. Other plan areas with significant PDR land were the Central Waterfront (19.7%) and the Port (11.1%).

TABLE 6.1.1.A ALL BUILDING PERMITS BY LAND USE CATEGORY, 1999-2008

This table presents the number of building permits filed by land use category (see Section 1.2 – Data Formats for a definition of land use categories). All building permits include new construction, alterations, and demolitions. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	4,130	5,344	4,195	3,181	3,581	3,813	4,202	4,133	4,366	3,791	4,074
Retail	2,136	1,790	1,787	1,745	1,753	1,887	1,661	2,139	1,852	1,927	1,868
PDR	284	345	315	239	211	176	185	170	198	235	236
Hotel	172	248	191	184	196	183	144	193	253	310	207
CiE	553	419	452	512	432	364	356	429	459	602	458
Residential	18,416	18,072	17,388	19,426	19,712	19,930	19,508	19,653	19,939	18,226	19,027
Other	883	1,213	933	625	766	724	779	689	931	819	836
TOTAL	26,574	27,431	25,261	25,912	26,651	27,077	26,835	27,406	27,998	25,910	26,706

Annual Percentage Distribution

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	15.5	19.5	16.6	12.3	13.4	14.1	15.7	15.1	15.6	14.6	15.2
Retail	8.0	6.5	7.1	6.7	6.6	7.0	6.2	7.8	6.6	7.4	7.0
PDR	1.1	1.3	1.2	0.9	0.8	0.6	0.7	0.6	0.7	0.9	0.9
Hotel	0.6	0.9	0.8	0.7	0.7	0.7	0.5	0.7	0.9	1.2	0.8
CiE	2.1	1.5	1.8	2.0	1.6	1.3	1.3	1.6	1.6	2.3	1.7
Residential	69.3	65.9	68.8	75.0	74.0	73.6	72.7	71.7	71.2	70.3	71.3
Other	3.3	4.4	3.7	2.4	2.9	2.7	2.9	2.5	3.3	3.2	3.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Office	29.4	-21.5	-24.2	12.6	6.5	10.2	-1.6	5.6	-13.2
Retail	-16.2	-0.2	-2.4	0.5	7.6	-12.0	28.8	-13.4	4.0
PDR	21.5	-8.7	-24.1	-11.7	-16.6	5.1	-8.1	16.5	18.7
Hotel	44.2	-23.0	-3.7	6.5	-6.6	-21.3	34.0	31.1	22.5
CiE	-24.2	7.9	13.3	-15.6	-15.7	-2.2	20.5	7.0	31.2
Residential	-1.9	-3.8	11.7	1.5	1.1	-2.1	0.7	1.5	-8.6
Other	37.4	-23.1	-33.0	22.6	-5.5	7.6	-11.6	35.1	-12.0
TOTAL	3.2	-7.9	2.6	2.9	1.6	-0.9	2.1	2.2	-7.5

Notes:

- PDR = Production/Distribution/Repair
- CiE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.1.B TOTAL CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY LAND USE CATEGORY, 1999-2008

This table presents the total cost of construction associated with building permits filed by land use category. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Office	\$330,270	\$827,426	\$233,256	\$179,323	\$156,504	\$186,497	\$210,249	\$317,964	\$378,393	\$232,285
Retail	\$323,704	\$236,699	\$76,120	\$66,935	\$85,382	\$56,203	\$49,522	\$75,189	\$94,333	\$72,920
PDR	\$25,733	\$74,319	\$29,060	\$18,942	\$9,708	\$12,622	\$7,951	\$8,804	\$20,449	\$11,925
Hotel	\$25,769	\$124,006	\$21,231	\$86,498	\$4,399	\$2,770	\$16,249	\$33,284	\$29,850	\$17,606
CIE	\$47,694	\$130,103	\$135,717	\$63,152	\$67,649	\$120,892	\$32,409	\$61,103	\$47,499	\$52,246
Residential	\$515,561	\$515,867	\$510,984	\$628,357	\$488,554	\$620,579	\$901,855	\$611,374	\$500,738	\$335,043
Other	\$6,578	\$14,637	\$12,429	\$3,129	\$3,398	\$8,174	\$4,382	\$17,878	\$14,564	\$5,247
TOTAL	\$1,275,310	\$1,923,057	\$1,018,798	\$1,046,337	\$815,595	\$1,007,737	\$1,222,617	\$1,125,597	\$1,085,824	\$727,272

Annual Percentage Distribution

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Office	25.9	43.0	22.9	17.1	19.2	18.5	17.2	28.2	34.8	31.9
Retail	25.4	12.3	7.5	6.4	10.5	5.6	4.1	6.7	8.7	10.0
PDR	2.0	3.9	2.9	1.8	1.2	1.3	0.7	0.8	1.9	1.6
Hotel	3.7	6.8	13.3	6.0	8.3	12.0	2.7	3.0	2.7	2.4
CIE	2.0	6.4	2.1	8.3	0.5	0.3	1.3	5.4	4.4	7.2
Residential	40.4	26.8	50.2	60.1	59.9	61.6	73.8	54.3	46.1	46.1
Other	0.5	0.8	1.2	0.3	0.4	0.8	0.4	1.6	1.3	0.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Office	150.5	-71.8	-23.1	-12.7	19.2	12.7	51.2	19.0	-38.6
Retail	-26.9	-67.8	-12.1	27.6	-34.2	-11.9	51.8	25.5	-22.7
PDR	188.8	-60.9	-34.8	-48.7	30.0	-37.0	10.7	132.3	-41.7
Hotel	172.8	4.3	-53.5	7.1	78.7	-73.2	2.7	-10.3	-41.0
CIE	381.2	-82.9	307.4	-94.9	-37.0	486.5	276.0	-22.3	10.0
Residential	0.1	-0.9	23.0	-22.2	27.0	45.3	-32.2	-18.1	-33.1
Other	122.5	-15.1	-74.8	8.6	140.6	-46.4	308.0	-18.5	-64.0
TOTAL	50.8	-47.0	2.7	-22.1	23.6	21.3	-7.9	-3.5	-35.4

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.1.1.C AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS
BY LAND USE CATEGORY, 1999-2008**

This table presents the average construction cost for all building permits filed by land use category. It represents the total costs (Table 6.1.1.A) divided by the total permits (Table 6.1.1.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	\$80.0	\$154.8	\$55.6	\$56.4	\$43.7	\$48.9	\$50.0	\$76.9	\$86.7	\$61.3	\$71.4
Retail	\$151.5	\$132.2	\$42.6	\$38.4	\$48.7	\$29.8	\$29.8	\$35.2	\$50.9	\$37.8	\$59.7
PDR	\$90.6	\$215.4	\$92.3	\$79.3	\$46.0	\$71.7	\$43.0	\$51.8	\$103.3	\$50.7	\$84.4
Hotel	\$149.8	\$500.0	\$111.2	\$470.1	\$22.4	\$15.1	\$112.8	\$172.5	\$118.0	\$56.8	\$172.9
CIE	\$86.2	\$310.5	\$300.3	\$123.3	\$156.6	\$332.1	\$91.0	\$142.4	\$103.5	\$86.8	\$173.3
Residential	\$28.0	\$28.5	\$29.4	\$32.3	\$24.8	\$31.1	\$46.2	\$31.1	\$25.1	\$18.4	\$29.5
Other	\$7.5	\$12.1	\$13.3	\$5.0	\$4.4	\$11.3	\$5.6	\$25.9	\$15.6	\$6.4	\$10.7
Average	\$48.0	\$70.1	\$40.3	\$40.4	\$30.6	\$37.2	\$45.6	\$41.1	\$38.8	\$28.1	\$44.9

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Office	93.6	-64.1	1.4	-22.5	11.9	2.3	53.8	12.7	-29.3
Retail	-12.7	-67.8	-10.0	27.0	-38.8	0.1	17.9	44.9	-25.7
PDR	137.7	-57.2	-14.1	-41.9	55.9	-40.1	20.5	99.4	-50.9
Hotel	233.8	-77.8	322.9	-95.2	-32.6	645.4	52.8	-31.6	-51.9
CIE	260.0	-3.3	-58.9	27.0	112.1	-72.6	56.5	-27.3	-16.1
Residential	2.0	3.0	10.1	-23.4	25.6	48.5	-32.7	-19.3	-26.8
Other	62.0	10.4	-62.4	-11.4	154.5	-50.2	361.3	-39.7	-59.0
TOTAL	46.1	-42.5	0.1	-24.2	21.6	22.4	-9.9	-5.6	-30.2

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.2.A BUILDING PERMITS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 1999-2008

This table presents the number of building permits filed for new construction by land use category. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	9	36	5	8	4	2	6	5	11	9	10
Retail	28	25	28	23	16	16	10	10	8	5	17
PDR	15	13	10	8	5	7	4	13	7	13	10
Hotel	1	2	1	2	0	0	0	1	0	0	1
CIE	9	8	17	6	11	9	5	18	11	5	10
Residential	422	343	250	216	252	189	260	179	150	101	236
Other	1	4	2	2	0	2	0	4	1	0	2
TOTAL	485	431	313	265	288	225	285	230	188	133	284

Annual Percentage Distribution

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	1.9	8.4	1.6	3.0	1.4	0.9	2.1	2.2	5.9	6.8	3.4
Retail	5.8	5.8	8.9	8.7	5.6	7.1	3.5	4.3	4.3	3.8	5.8
PDR	3.1	3.0	3.2	3.0	1.7	3.1	1.4	5.7	3.7	9.8	3.8
Hotel	0.2	0.5	0.3	0.8	0.0	0.0	0.0	0.4	0.0	0.0	0.2
CIE	1.9	1.9	5.4	2.3	3.8	4.0	1.8	7.8	5.9	3.8	3.8
Residential	87.0	79.6	79.9	81.5	87.5	84.0	91.2	77.8	79.8	75.9	82.4
Other	0.2	0.9	0.6	0.8	0.0	0.9	0.0	1.7	0.5	0.0	0.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Office	300.0	-86.1	60.0	-50.0	-50.0	200.0	-16.7	120.0	-18.2
Retail	-10.7	12.0	-17.9	-30.4	0.0	-37.5	0.0	-20.0	-37.5
PDR	-13.3	-23.1	-20.0	-37.5	40.0	-42.9	225.0	-46.2	85.7
Hotel	100.0	-50.0	100.0	-100.0	-	-	-	-100.0	-
CIE	-11.1	112.5	-64.7	83.3	-18.2	-44.4	260.0	-38.9	-54.5
Residential	-18.7	-27.1	-13.6	16.7	-25.0	37.6	-31.2	-16.2	-32.7
Other	300.0	-50.0	0.0	-100.0	-	-100.0	-	-75.0	-100.0
TOTAL	-11.1	-27.4	-15.3	8.7	-21.9	26.7	-19.3	-18.3	-29.3

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 1999-2008

This table presents the total cost of new construction associated with building permits filed by land use category over the last ten years. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	\$69,095	\$485,719	\$13,458	\$27,341	\$1,218	\$17,636	\$13,625	\$110,039	\$92,421	\$65,762	\$89,631
Retail	\$34,691	\$161,636	\$24,204	\$20,471	\$34,792	\$9,488	\$4,274	\$527	\$22,101	\$25,437	\$33,762
PDR	\$8,623	\$25,607	\$13,110	\$9,725	\$1,685	\$2,500	\$460	\$1,932	\$14,569	\$5,403	\$8,361
Hotel	\$12,164	\$30,029	\$2,879	\$76,341	\$0	\$0	\$0	\$5,727	\$0	\$0	\$12,714
CIE	\$10,148	\$89,541	\$105,377	\$30,200	\$20,783	\$15,867	\$7,791	\$16,563	\$9,001	\$9,867	\$31,514
Residential	\$296,264	\$268,354	\$284,073	\$338,534	\$199,517	\$369,527	\$633,955	\$375,230	\$203,202	\$85,590	\$305,424
Other	\$0	\$4,382	\$0	\$0	\$0	\$108	\$0	\$0	\$129	\$129	\$462
TOTAL	\$430,985	\$1,065,268	\$443,100	\$502,611	\$257,995	\$415,126	\$660,105	\$510,018	\$341,423	\$192,059	\$481,869

Annual Percentage Distribution

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	16.0	45.6	3.0	5.4	0.5	4.2	2.1	21.6	27.1	34.2	16.0
Retail	8.0	15.2	5.5	4.1	13.5	2.3	0.6	0.1	6.5	13.2	6.9
PDR	2.0	2.4	3.0	1.9	0.7	0.6	0.1	0.4	4.3	2.8	1.8
Hotel	2.8	2.8	0.6	15.2	0.0	0.0	0.0	1.1	0.0	0.0	2.3
CIE	2.4	8.4	23.8	6.0	8.1	3.8	1.2	3.2	2.6	5.1	6.5
Residential	68.7	25.2	64.1	67.4	77.3	89.0	96.0	73.6	59.5	44.6	66.5
Other	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Office	603.0	-97.2	103.2	-95.5	1348.0	-22.7	707.6	-16.0	-28.8
Retail	365.9	-85.0	-15.4	70.0	-72.7	-55.0	-87.7	4,090.9	15.1
PDR	197.0	-48.8	-25.8	-82.7	48.4	-81.6	319.8	654.2	-62.9
Hotel	146.9	-90.4	2551.9	-100.0	-	-	-	-100.0	-
CIE	782.4	17.7	-71.3	-31.2	-23.7	-50.9	112.6	-45.7	9.6
Residential	-9.4	5.9	19.2	-41.1	85.2	71.6	-40.8	-45.8	-57.9
Other	-	-100.0	-	-	-	-	-	-	-100.0
TOTAL	147.2	-58.4	13.4	-48.7	60.9	59.0	-22.7	-33.1	-43.7

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.2.C AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 1999-2008

This table presents the average cost of new construction for all building permits filed by land use category. It represents the total costs (Table 6.1.2.A) divided by the total permits (Table 6.1.2.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	\$7,677.2	\$13,492.2	\$2,691.6	\$3,417.6	\$304.5	\$8,818.0	\$2,270.8	\$22,007.7	\$8,401.9	\$7,306.9	\$7,638.8
Retail	\$1,239.0	\$6,465.4	\$864.4	\$890.0	\$2,174.5	\$593.0	\$427.4	\$52.7	\$2,762.7	\$5,087.4	\$2,055.7
PDR	\$574.9	\$1,969.8	\$1,311.0	\$1,215.6	\$337.0	\$357.1	\$115.0	\$148.6	\$2,081.3	\$415.6	\$852.6
Hotel	\$12,164.1	\$15,014.7	\$2,878.8	\$38,170.3	-	-	-	\$5,726.8	-	-	\$14,791.0
CIE	\$1,127.5	\$11,192.6	\$6,198.7	\$5,033.3	\$1,889.4	\$1,763.0	\$1,558.3	\$920.2	\$818.3	\$1,973.4	\$3,247.4
Residential	\$702.0	\$782.4	\$1,136.3	\$1,567.3	\$791.7	\$1,955.2	\$2,438.3	\$2,096.3	\$1,354.7	\$847.4	\$1,367.2
Other	\$0.0	\$1,095.5	\$0.0	\$0.0	-	\$54.0	-	\$0.0	\$129.0	-	\$182.6
TOTAL	\$888.6	\$2,471.6	\$1,415.7	\$1,896.6	\$895.8	\$1,845.0	\$2,316.2	\$2,217.5	\$1,816.1	\$1,444.1	\$1,720.7

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06	2006-07	2007-08
Office	75.7	-80.1	27.0	-91.1	2,796.1	-74.2	869.2	-61.8	-13.0
Retail	421.8	-86.6	3.0	144.3	-72.7	-27.9	-87.7	5,138.6	84.1
PDR	242.7	-33.4	-7.3	-72.3	6.0	-67.8	29.2	1,300.6	-80.0
Hotel	23.4	-80.8	1,225.9	-	-	-	-	-	-
CIE	892.7	-44.6	-18.8	-62.5	-6.7	-11.6	-40.9	-11.1	141.2
Residential	11.4	45.2	37.9	-49.5	146.9	24.7	-14.0	-35.4	-37.4
Other	-	-100.0	-	-	-	-	-	-	-
TOTAL	178.1	-42.7	34.0	-52.8	106.0	25.5	-4.3	-18.1	-20.5

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.1.3.A BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS
BY LAND USE CATEGORY, 1999-2008**

This table presents the number of building permits filed for alterations and demolitions by land use category. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	4,121	5,308	4,189	3,173	3,577	3,811	4,196	4,128	4,355	3,782	4,064
Retail	2,108	1,765	1,760	1,722	1,737	1,871	1,651	2,129	1,844	1,922	1,851
PDR	269	332	305	231	206	169	181	157	191	222	226
Hotel	171	246	190	182	196	183	144	192	253	310	207
CIE	544	411	435	506	421	355	351	411	448	597	448
Residential	17,993	17,730	17,138	19,210	19,460	19,741	19,249	19,474	19,789	18,125	1,891
Other	269	645	444	284	267	273	379	264	335	270	343
TOTAL	25,475	26,437	24,461	25,308	25,864	26,403	26,151	26,755	27,215	25,228	25,930

Annual Percentage Distribution

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Office	16.2	20.1	17.1	12.5	13.8	14.4	16.0	15.4	16.0	15.0
Retail	8.3	6.7	7.2	6.8	6.7	7.1	6.3	8.0	6.8	7.6
PDR	1.1	1.3	1.2	0.9	0.8	0.6	0.7	0.6	0.7	0.9
Hotel	0.7	0.9	0.8	0.7	0.8	0.7	0.6	0.7	0.9	1.2
CIE	2.1	1.6	1.8	2.0	1.6	1.3	1.3	1.5	1.6	2.4
Residential	70.6	67.1	70.1	75.9	75.2	74.8	73.6	72.8	72.7	71.8
Other	1.1	2.4	1.8	1.1	1.0	1.0	1.4	1.0	1.2	1.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Office	28.8	-21.1	-24.3	12.7	6.5	10.1	-1.6	5.5	-13.2
Retail	-16.3	-0.3	-2.2	0.9	7.7	-11.8	29.0	-13.4	4.2
PDR	23.4	-8.1	-24.3	-10.8	-18.0	7.1	-13.3	21.7	16.2
Hotel	43.9	-22.8	-4.2	7.7	-6.6	-21.3	33.3	31.8	22.5
CIE	-24.4	5.8	16.3	-16.8	-15.7	-1.1	17.1	9.0	33.3
Residential	-1.5	-3.3	12.1	1.3	1.4	-2.5	1.2	1.6	-8.4
Other	139.8	-31.2	-36.0	-6.0	2.2	38.8	-30.3	26.9	-1.4
TOTAL	3.8	-7.5	3.5	2.2	2.1	-1.0	2.3	1.7	-7.3

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.3.B TOTAL CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 1999-2008

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by land use category. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	\$261,175	\$341,707	\$219,798	\$151,983	\$155,286	\$168,861	\$196,625	\$207,926	\$285,972	\$166,523	\$215,586
Retail	\$289,013	\$75,063	\$51,916	\$46,464	\$50,590	\$46,714	\$45,248	\$74,662	\$72,232	\$47,483	\$79,939
PDR	\$17,111	\$48,712	\$15,951	\$9,217	\$8,023	\$10,122	\$7,491	\$6,872	\$5,880	\$6,522	\$13,590
Hotel	\$13,605	\$93,976	\$18,352	\$10,157	\$4,399	\$2,770	\$16,249	\$27,521	\$29,850	\$17,606	\$23,449
CIE	\$37,546	\$40,562	\$30,340	\$32,952	\$46,866	\$105,026	\$24,618	\$44,540	\$38,498	\$42,379	\$44,333
Residential	\$219,297	\$247,513	\$226,912	\$289,823	\$289,037	\$251,052	\$267,900	\$236,145	\$297,536	\$249,453	\$257,467
Other	\$759	\$3,830	\$1,711	\$625	\$779	\$500	\$1,491	\$3,720	\$4,043	\$2,549	\$2,001
TOTAL	\$838,506	\$851,364	\$564,979	\$541,222	\$554,981	\$585,046	\$559,622	\$601,385	\$734,009	\$532,515	\$636,363

Annual Percentage Distribution

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Office	31.1	40.1	38.9	28.1	28.0	28.9	35.1	34.6	39.0	31.3
Retail	34.5	8.8	9.2	8.6	9.1	8.0	8.1	12.4	9.8	8.9
PDR	2.0	5.7	2.8	1.7	1.4	1.7	1.3	1.1	0.8	1.2
Hotel	1.6	11.0	3.2	1.9	0.8	0.5	2.9	4.6	4.1	3.3
CIE	4.5	4.8	5.4	6.1	8.4	18.0	4.4	7.4	5.2	8.0
Residential	26.2	29.1	40.2	53.5	52.1	42.9	47.9	39.3	40.5	46.8
Other	0.1	0.4	0.3	0.1	0.1	0.1	0.3	0.6	0.6	0.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Office	30.8	-35.7	-30.9	2.2	8.7	16.4	5.7	37.5	-41.8
Retail	-74.0	-30.8	-10.5	8.9	-7.7	-3.1	65.0	-3.3	-34.3
PDR	184.7	-67.3	-42.2	-13.0	26.2	-26.0	-8.3	-14.4	10.9
Hotel	590.8	-80.5	-44.7	-56.7	-37.0	486.5	69.4	8.5	-41.0
CIE	8.0	-25.2	8.6	42.2	124.1	-76.6	80.9	-13.6	10.1
Residential	12.9	-8.3	27.7	-0.3	-13.1	6.7	-11.9	26.0	-16.2
Other	404.7	-55.3	-63.5	24.6	-35.7	198.0	149.4	8.7	-37.0
TOTAL	1.5	-33.6	-4.2	2.5	5.4	-4.3	7.5	22.1	-27.5

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.3.C AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 1999-2008

This table presents the average construction cost for all building permits filed for alterations and demolitions by land use category. It represents the total costs (Table 6.1.3.A) divided by the total permits (Table 6.1.3.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average
Office	\$63.4	\$64.4	\$52.5	\$47.9	\$43.4	\$44.3	\$46.9	\$50.4	\$65.7	\$44.0	\$52.3
Retail	\$137.1	\$42.5	\$29.5	\$27.0	\$29.1	\$25.0	\$27.4	\$35.1	\$39.2	\$24.7	\$41.7
PDR	\$63.6	\$146.7	\$52.3	\$39.9	\$38.9	\$59.9	\$41.4	\$43.8	\$30.8	\$29.4	\$54.7
Hotel	\$79.6	\$382.0	\$96.6	\$55.8	\$22.4	\$15.1	\$112.8	\$143.3	\$118.0	\$56.8	\$108.3
CIE	\$69.0	\$98.7	\$69.7	\$65.1	\$111.3	\$295.8	\$70.1	\$108.4	\$85.9	\$71.0	\$104.5
Residential	\$12.2	\$14.0	\$13.2	\$15.1	\$14.9	\$12.7	\$13.9	\$12.1	\$15.0	\$13.8	\$13.7
Other	\$2.8	\$5.9	\$3.9	\$2.2	\$2.9	\$1.8	\$3.9	\$14.1	\$12.1	\$9.4	\$5.9
TOTAL	\$32.9	\$32.2	\$23.1	\$21.4	\$21.5	\$22.2	\$21.4	\$22.5	\$27.0	\$21.1	\$24.5

Percentage Change

Land Use Category	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06	2006-07	2007-08
Office	1.6	-18.5	-8.7	-9.4	2.1	5.8	7.5	30.4	-32.9
Retail	-69.0	-30.6	-8.5	7.9	-14.3	9.8	28.0	11.7	-36.9
PDR	130.7	-64.4	-23.7	-2.4	53.8	-30.9	5.8	-29.7	-4.6
Hotel	380.2	-74.7	-42.2	-59.8	-32.6	645.4	27.0	-17.7	-51.9
CIE	43.0	-29.3	-6.6	70.9	165.8	-76.3	54.5	-20.7	-17.4
Residential	14.5	-5.2	13.9	-1.6	-14.4	9.4	-12.9	24.0	-8.5
Other	110.5	-35.1	-42.9	32.5	-37.1	114.6	258.1	-14.3	-21.8
TOTAL	-2.2	-28.3	-7.4	0.3	3.3	-3.4	5.0	20.0	-21.7

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.2.1.A ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 1999-2008

This table presents the number of building permits filed by Commerce & Industry District (see Section 1.2 - Data Formats for a definition of Commerce & Industry Districts). All building permits include new construction, alterations, and demolitions. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	667	779	1,023	831	765	651	702	702	715	635
Civic Center	780	951	853	738	858	850	801	766	999	897
Financial	3,255	4,150	3,301	2,604	2,965	3,363	3,724	3,486	3,733	3,369
Mission	1,800	2,001	1,867	2,127	2,129	2,042	2,004	2,070	1,988	1,984
North Beach	751	791	714	888	814	788	842	840	803	838
North Central	3,315	3,355	2,914	3,581	3,781	3,575	3,602	3,844	4,052	3,499
Northwest	2,291	2,433	2,117	2,285	2,461	2,575	2,477	2,490	2,422	2,485
South of Market	2,482	2,517	2,113	2,053	2,035	2,038	2,116	2,512	2,259	2,254
Southwest	9,199	9,028	8,865	9,574	9,549	9,902	9,372	9,432	9,381	8,670
Van Ness	1,089	1,158	1,086	1,032	1,144	1,140	1,063	1,175	1,509	1,192
Unclassified	945	268	408	199	150	153	132	89	137	87
TOTAL	26,574	27,431	25,261	25,912	26,651	27,077	26,835	27,406	27,998	25,910

Annual Percentage Distribution

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	2.5	2.8	4.0	3.2	2.9	2.4	2.6	2.6	2.6	2.5
Civic Center	2.9	3.5	3.4	2.8	3.2	3.1	3.0	2.8	3.6	3.5
Financial	12.2	15.1	13.1	10.0	11.1	12.4	13.9	12.7	13.3	13.0
Mission	6.8	7.3	7.4	8.2	8.0	7.5	7.5	7.6	7.1	7.7
North Beach	2.8	2.9	2.8	3.4	3.1	2.9	3.1	3.1	2.9	3.2
North Central	12.5	12.2	11.5	13.8	14.2	13.2	13.4	14.0	14.5	13.5
Northwest	8.6	8.9	8.4	8.8	9.2	9.5	9.2	9.1	8.7	9.6
South of Market	9.3	9.2	8.4	7.9	7.6	7.5	7.9	9.2	8.1	8.7
Southwest	34.6	32.9	35.1	36.9	35.8	36.6	34.9	34.4	33.5	33.5
Van Ness	4.1	4.2	4.3	4.0	4.3	4.2	4.0	4.3	5.4	4.6
Unclassified	3.6	1.0	1.6	0.8	0.6	0.6	0.5	0.3	0.5	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Bayview	16.8	31.3	-18.8	-7.9	-14.9	7.8	0.0	1.9	-11.2
Civic Center	21.9	-10.3	-13.5	16.3	-0.9	-5.8	-4.4	30.4	-10.2
Financial	27.5	-20.5	-21.1	13.9	13.4	10.7	-6.4	7.1	-9.8
Mission	11.2	-6.7	13.9	0.1	-4.1	-1.9	3.3	-4.0	-0.2
North Beach	5.3	-9.7	24.4	-8.3	-3.2	6.9	-0.2	-4.4	4.4
North Central	1.2	-13.1	22.9	5.6	-5.4	0.8	6.7	5.4	-13.6
Northwest	6.2	-13.0	7.9	7.7	4.6	-3.8	0.5	-2.7	2.6
South of Market	1.4	-16.1	-2.8	-0.9	0.1	3.8	18.7	-10.1	-0.2
Southwest	-1.9	-1.8	8.0	-0.3	3.7	-5.4	0.6	-0.5	-7.6
Van Ness	6.3	-6.2	-5.0	10.9	-0.3	-6.8	10.5	28.4	-21.0
Unclassified	-71.6	52.2	-51.2	-24.6	2.0	-13.7	-32.6	53.9	-36.5
TOTAL	3.2	-7.9	2.6	2.9	1.6	-0.9	2.1	2.2	-7.5

Sources: San Francisco Planning Department; Department of Building Inspection

TABLE 6.2.1.B TOTAL CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 1999-2008

This table presents the total cost of construction associated with building permits filed by Commerce & Industry District. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 1983 \$'000s)

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	\$45,184	\$139,064	\$39,034	\$22,039	\$24,288	\$26,638	\$68,911	\$31,846	\$59,991	\$9,481
Civic Center	\$37,821	\$77,535	\$91,014	\$76,318	\$51,815	\$44,643	\$37,247	\$70,427	\$46,157	\$32,085
Financial	\$311,004	\$639,353	\$199,284	\$269,136	\$189,814	\$335,011	\$334,856	\$256,927	\$206,042	\$192,645
Mission	\$42,758	\$87,586	\$43,060	\$46,891	\$43,451	\$38,903	\$50,569	\$51,277	\$94,178	\$27,648
North Beach	\$29,259	\$27,976	\$17,654	\$69,510	\$23,739	\$24,274	\$16,853	\$22,985	\$15,062	\$16,613
North Central	\$108,873	\$79,242	\$67,449	\$68,143	\$75,805	\$75,600	\$64,020	\$186,443	\$98,961	\$87,220
Northwest	\$54,345	\$58,529	\$61,017	\$42,026	\$38,631	\$41,461	\$40,921	\$43,595	\$63,908	\$41,473
South of Market	\$397,591	\$523,482	\$223,719	\$252,158	\$136,431	\$164,524	\$385,033	\$262,220	\$276,617	\$168,748
Southwest	\$185,417	\$220,112	\$166,320	\$164,656	\$168,559	\$208,312	\$149,324	\$135,044	\$136,945	\$122,339
Van Ness	\$32,395	\$48,230	\$51,155	\$32,851	\$41,485	\$37,462	\$73,567	\$45,162	\$86,344	\$27,607
Unclassified	\$30,664	\$21,948	\$59,091	\$2,608	\$21,577	\$10,909	\$1,316	\$19,635	\$1,619	\$1,411
TOTAL	\$1,275,310	\$1,923,057	\$1,018,798	\$1,046,337	\$815,595	\$1,007,737	\$1,222,617	\$1,125,561	\$1,085,824	\$727,270

Annual Percentage Distribution

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	3.5	7.2	3.8	2.1	3.0	2.6	5.6	2.8	5.5	1.3
Civic Center	3.0	4.0	8.9	7.3	6.4	4.4	3.0	6.3	4.3	4.4
Financial	24.4	33.2	19.6	25.7	23.3	33.2	27.4	22.8	19.0	26.5
Mission	3.4	4.6	4.2	4.5	5.3	3.9	4.1	4.6	8.7	3.8
North Beach	2.3	1.5	1.7	6.6	2.9	2.4	1.4	2.0	1.4	2.3
North Central	8.5	4.1	6.6	6.5	9.3	7.5	5.2	16.6	9.1	12.0
Northwest	4.3	3.0	6.0	4.0	4.7	4.1	3.3	3.9	5.9	5.7
South of Market	31.2	27.2	22.0	24.1	16.7	16.3	31.5	23.3	25.5	23.2
Southwest	14.5	11.4	16.3	15.7	20.7	20.7	12.2	12.0	12.6	16.8
Van Ness	2.5	2.5	5.0	3.1	5.1	3.7	6.0	4.0	8.0	3.8
Unclassified	2.4	1.1	5.8	0.2	2.6	1.1	0.1	1.7	0.1	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Bayview	207.8	-71.9	-43.5	10.2	9.7	158.7	-53.8	88.4	-84.2
Civic Center	105.0	17.4	-16.1	-32.1	-13.8	-16.6	89.1	-34.5	-30.5
Financial	105.6	-68.8	35.1	-29.5	76.5	-0.0	-23.3	-19.8	-6.5
Mission	104.8	-50.8	8.9	-7.3	-10.5	30.0	1.4	83.7	-70.6
North Beach	-4.4	-36.9	293.7	-65.8	2.3	-30.6	36.4	-34.5	10.3
North Central	-27.2	-14.9	1.0	11.2	-0.3	-15.3	191.2	-46.9	-11.9
Northwest	7.7	4.3	-31.1	-8.1	7.3	-1.3	6.5	46.6	-5.1
South of Market	31.7	-57.3	12.7	-45.9	20.6	134.0	-31.9	5.5	-39.0
Southwest	18.7	-24.4	-1.0	2.4	23.6	-28.3	-9.6	1.4	-10.7
Van Ness	48.9	6.1	-35.8	26.3	-9.7	96.4	-38.6	91.2	-68.0
Unclassified	-28.4	169.2	-95.6	727.4	-49.4	-87.9	1392.2	-91.8	-12.8
TOTAL	50.8	-47.0	2.7	-22.1	23.6	21.3	-7.9	-3.5	-33.0

Sources: San Francisco Planning Department; Department of Building Inspection

**TABLE 6.2.1.C AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS
BY COMMERCE & INDUSTRY DISTRICT, 1999-2008**

This table presents the average construction cost for all building permits filed by Commerce & Industry District. It represents the total costs (Table 6.2.1.A) divided by the total permits (Table 6.2.1.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	\$67.7	\$178.5	\$38.2	\$26.5	\$31.7	\$40.9	\$98.2	\$45.4	\$83.9	\$14.9
Civic Center	\$48.5	\$81.5	\$106.7	\$103.4	\$60.4	\$52.5	\$46.5	\$91.9	\$46.2	\$35.8
Financial	\$95.5	\$154.1	\$60.4	\$103.4	\$64.0	\$99.6	\$89.9	\$73.7	\$55.2	\$57.2
Mission	\$23.8	\$43.8	\$23.1	\$22.0	\$20.4	\$19.1	\$25.2	\$24.8	\$47.4	\$13.9
North Beach	\$39.0	\$35.4	\$24.7	\$78.3	\$29.2	\$30.8	\$20.0	\$27.4	\$18.8	\$19.8
North Central	\$32.8	\$23.6	\$23.1	\$19.0	\$20.0	\$21.1	\$17.8	\$48.5	\$24.4	\$24.9
Northwest	\$23.7	\$24.1	\$28.8	\$18.4	\$15.7	\$16.1	\$16.5	\$17.5	\$26.4	\$16.7
South of Market	\$160.2	\$208.0	\$105.9	\$122.8	\$67.0	\$80.7	\$182.0	\$104.4	\$122.5	\$74.9
Southwest	\$20.2	\$24.4	\$18.8	\$17.2	\$17.7	\$21.0	\$15.9	\$14.3	\$14.6	\$14.1
Van Ness	\$29.7	\$41.6	\$47.1	\$31.8	\$36.3	\$32.9	\$69.2	\$38.4	\$57.2	\$23.2
Unclassified	\$32.4	\$81.9	\$144.8	\$13.1	\$143.8	\$71.3	\$10.0	\$220.6	\$11.8	\$16.2
Citywide Average	\$48.0	\$70.1	\$40.3	\$40.4	\$30.6	\$37.2	\$45.6	\$41.1	\$38.8	\$28.1

Percentage Change

C&I District	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06	2006-07	2007-08
Bayview	163.5	-78.6	-30.5	19.7	28.9	139.9	-53.8	85.0	-82.2
Civic Center	68.1	30.9	-3.1	-41.6	-13.0	-11.5	97.7	-49.7	-22.6
Financial	61.2	-60.8	71.2	-38.1	55.6	-9.7	-18.0	-25.1	3.6
Mission	84.3	-47.3	-4.4	-7.4	-6.7	32.5	-1.8	91.2	-70.6
North Beach	-9.2	-30.1	216.6	-62.7	5.6	-35.0	36.7	-31.5	5.7
North Central	-28.1	-2.0	-17.8	5.4	5.5	-16.0	172.9	-49.6	2.1
Northwest	1.4	19.8	-36.2	-14.7	2.6	2.6	6.0	50.7	-36.8
South of Market	29.8	-49.1	16.0	-45.4	20.4	125.4	-42.6	17.3	-38.9
Southwest	21.0	-23.0	-8.3	2.6	19.2	-24.3	-10.1	2.0	-3.3
Van Ness	40.0	13.1	-32.4	13.9	-9.4	110.6	-44.5	48.9	-59.5
Unclassified	152.4	76.8	-91.0	997.7	-50.4	-86.0	2,113.1	-94.6	37.2
Citywide Average	46.1	-42.5	0.1	-24.2	21.6	22.4	-9.9	-5.6	-27.6

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.2.2.A BUILDING PERMITS FOR NEW CONSTRUCTION
BY COMMERCE & INDUSTRY DISTRICT, 1999-2008**

This table presents the number of building permits filed for new construction by Commerce & Industry District. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	44	40	38	30	8	23	34	27	15	16
Civic Center	3	8	4	7	4	4	4	3	2	4
Financial	4	19	5	1	3	6	9	6	6	3
Mission	38	50	21	26	33	22	30	28	31	8
North Beach	4	6	3	23	6	5	4	1	0	1
North Central	61	23	20	13	17	16	41	23	18	14
Northwest	54	33	31	17	16	8	10	16	12	7
South of Market	71	79	36	25	39	31	38	31	21	20
Southwest	194	154	147	115	109	101	86	74	67	56
Van Ness	9	12	6	4	8	6	23	11	11	2
Unclassified	3	6	2	4	45	3	5	10	5	2
TOTAL	485	430	313	265	288	225	284	230	188	133

Annual Percentage Distribution

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	9.1	9.3	12.1	11.3	2.8	10.2	12.0	11.7	8.0	12.0
Civic Center	0.6	1.9	1.3	2.6	1.4	1.8	1.4	1.3	1.1	3.0
Financial	0.8	4.4	1.6	0.4	1.0	2.7	3.2	2.6	3.2	2.3
Mission	7.8	11.6	6.7	9.8	11.5	9.8	10.6	12.2	16.5	6.0
North Beach	0.8	1.4	1.0	8.7	2.1	2.2	1.4	0.4	0.0	0.8
North Central	12.6	5.3	6.4	4.9	5.9	7.1	14.4	10.0	9.6	10.5
Northwest	11.1	7.7	9.9	6.4	5.6	3.6	3.5	7.0	6.4	5.3
South of Market	14.6	18.4	11.5	9.4	13.5	13.8	13.4	13.5	11.2	15.0
Southwest	40.0	35.8	47.0	43.4	37.8	44.9	30.3	32.2	35.6	42.1
Van Ness	1.9	2.8	1.9	1.5	2.8	2.7	8.1	4.8	5.9	1.5
Unclassified	0.6	1.4	0.6	1.5	15.6	1.3	1.8	4.3	2.7	1.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Bayview	-9.1	-5.0	-21.1	-73.3	187.5	47.8	-20.6	-44.4	6.7
Civic Center	166.7	-50.0	75.0	-42.9	0.0	0.0	-25.0	-33.3	100.0
Financial	375.0	-73.7	-80.0	200.0	100.0	50.0	-33.3	0.0	-50.0
Mission	31.6	-58.0	23.8	26.9	-33.3	36.4	-6.7	10.7	-74.2
North Beach	50.0	-50.0	666.7	-73.9	-16.7	-20.0	-75.0	-100.0	-
North Central	-62.3	-13.0	-35.0	30.8	-5.9	156.3	-43.9	-21.7	-22.2
Northwest	-38.9	-6.1	-45.2	-5.9	-50.0	25.0	60.0	-25.0	-41.7
South of Market	11.3	-54.4	-30.6	56.0	-20.5	22.6	-18.4	-32.3	-4.8
Southwest	-20.6	-4.5	-21.8	-5.2	-7.3	-14.9	-14.0	-9.5	-16.4
Van Ness	33.3	-50.0	-33.3	100.0	-25.0	283.3	-52.2	0.0	-81.8
Unclassified	100.0	-66.7	100.0	1025.0	-93.3	66.7	100.0	-50.0	-60.0
TOTAL	-11.3	-27.2	-15.3	8.7	-21.9	26.2	-19.0	-18.3	-29.3

Sources: San Francisco Planning Department; Department of Building Inspection

TABLE 6.2.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 1999-2008

This table presents the total cost of new construction associated with building permits filed by Commerce & Industry District. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	\$33,003	\$111,560	\$25,716	\$7,908	\$8,488	\$12,786	\$57,640	\$8,256	\$29,012	\$2,088
Civic Center	\$4,734	\$14,173	\$41,941	\$50,685	\$13,011	\$6,579	\$16,590	\$36,173	\$797	\$4,904
Financial	\$79,800	\$305,853	\$35,501	\$106,337	\$21,546	\$192,254	\$151,456	\$105,078	\$37,556	\$4,554
Mission	\$19,003	\$35,149	\$11,632	\$19,940	\$18,060	\$18,335	\$25,690	\$31,414	\$61,184	\$1,699
North Beach	\$12,894	\$5,567	\$1,054	\$50,840	\$3,456	\$3,882	\$2,260	\$457	\$0	\$1,875
North Central	\$57,420	\$15,852	\$8,862	\$12,182	\$22,068	\$27,971	\$6,065	\$111,152	\$20,638	\$34,056
Northwest	\$23,634	\$18,486	\$28,988	\$5,297	\$7,299	\$3,675	\$6,550	\$4,165	\$30,990	\$7,425
South of Market	\$111,307	\$399,808	\$144,524	\$185,276	\$66,333	\$94,819	\$313,439	\$159,029	\$91,418	\$103,497
Southwest	\$67,576	\$126,396	\$71,340	\$55,350	\$59,611	\$33,341	\$26,144	\$26,366	\$22,409	\$29,019
Van Ness	\$5,694	\$15,917	\$21,781	\$8,325	\$22,021	\$13,106	\$53,606	\$10,277	\$46,826	\$2,234
Unclassified	\$15,919	\$16,507	\$51,762	\$471	\$16,100	\$8,377	\$665	\$17,651	\$594	\$707
TOTAL	\$430,985	\$1,065,268	\$443,100	\$502,611	\$257,995	\$415,126	\$660,105	\$510,018	\$341,423	\$192,058

Annual Percentage Distribution

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	7.7	10.5	5.8	1.6	3.3	3.1	8.7	1.6	8.5	1.1
Civic Center	1.1	1.3	9.5	10.1	5.0	1.6	2.5	7.1	0.2	2.6
Financial	18.5	28.7	8.0	21.2	8.4	46.3	22.9	20.6	11.0	2.4
Mission	4.4	3.3	2.6	4.0	7.0	4.4	3.9	6.2	17.9	0.9
North Beach	3.0	0.5	0.2	10.1	1.3	0.9	0.3	0.1	0.0	1.0
North Central	13.3	1.5	2.0	2.4	8.6	6.7	0.9	21.8	6.0	17.7
Northwest	5.5	1.7	6.5	1.1	2.8	0.9	1.0	0.8	9.1	3.9
South of Market	25.8	37.5	32.6	36.9	25.7	22.8	47.5	31.2	26.8	53.9
Southwest	15.7	11.9	16.1	11.0	23.1	8.0	4.0	5.2	6.6	15.1
Van Ness	1.3	1.5	4.9	1.7	8.5	3.2	8.1	2.0	13.7	1.2
Unclassified	3.7	1.5	11.7	0.1	6.2	2.0	0.1	3.5	0.2	0.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Bayview	238.0	-76.9	-69.2	7.3	50.6	350.8	-85.7	251.4	-92.8
Civic Center	199.4	195.9	20.8	-74.3	-49.4	152.2	118.0	-97.8	515.1
Financial	283.3	-88.4	199.5	-79.7	792.3	-21.2	-30.6	-64.3	-87.9
Mission	85.0	-66.9	71.4	-9.4	1.5	40.1	22.3	94.8	-97.2
North Beach	-56.8	-81.1	4,725.7	-93.2	12.3	-41.8	-79.8	-100.0	-
North Central	-72.4	-44.1	37.5	81.2	26.7	-78.3	1,732.7	-81.4	65.0
Northwest	-21.8	56.8	-81.7	37.8	-49.6	78.2	-36.4	644.1	-76.0
South of Market	259.2	-63.9	28.2	-64.2	42.9	230.6	-49.3	-42.5	13.2
Southwest	87.0	-43.6	-22.4	7.7	-44.1	-21.6	0.8	-15.0	29.5
Van Ness	179.5	36.8	-61.8	164.5	-40.5	309.0	-80.8	355.6	-95.2
Unclassified	3.7	213.6	-99.1	3,318.8	-48.0	-92.1	2,555.8	-96.6	19.1
TOTAL	147.2	-58.4	13.4	-48.7	60.9	59.0	-22.7	-33.1	-43.7

Sources: San Francisco Planning Department; Department of Building Inspection

TABLE 6.2.2.C AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 1999-2008

This table presents the average cost of new construction for all building permits filed by Commerce & Industry District. It represents the total costs (Table 6.2.2.A) divided by the total permits (Table 6.2.2.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	\$750.1	\$2,789.0	\$676.7	\$263.6	\$1,061.0	\$555.9	\$1,695.3	\$305.8	\$1,934.1	\$130.5
Civic Center	\$1,578.0	\$1,771.6	\$10,485.1	\$7,240.7	\$3,252.7	\$1,644.8	\$4,147.5	\$12,057.7	\$398.6	\$1,226.0
Financial	\$19,950.0	\$16,097.5	\$7,100.2	\$106,337.1	\$7,181.9	\$32,042.3	\$16,828.4	\$17,513.0	\$6,259.4	\$1,518.0
Mission	\$500.1	\$703.0	\$553.9	\$766.9	\$547.3	\$833.4	\$856.3	\$1,121.9	\$1,973.7	\$212.4
North Beach	\$3,223.5	\$927.8	\$351.2	\$2,210.4	\$576.1	\$776.3	\$564.9	\$457.0	-	\$1,875.0
North Central	\$941.3	\$689.2	\$443.1	\$937.1	\$1,298.1	\$1,748.2	\$147.9	\$4,832.7	\$1,146.5	\$2,432.6
Northwest	\$437.7	\$560.2	\$935.1	\$311.6	\$456.2	\$459.4	\$655.0	\$260.3	\$2,582.5	\$1,060.7
South of Market	\$1,567.7	\$5,060.9	\$4,014.5	\$7,411.0	\$1,700.9	\$3,058.7	\$8,248.4	\$5,130.0	\$4,353.2	\$5,174.9
Southwest	\$348.3	\$820.8	\$485.3	\$481.3	\$546.9	\$330.1	\$304.0	\$356.3	\$334.5	\$518.2
Van Ness	\$632.7	\$1,326.4	\$3,630.2	\$2,081.2	\$2,752.7	\$2,184.4	\$2,330.7	\$934.3	\$4,256.9	\$1,117.0
Unclassified	\$5,306.4	\$2,751.2	\$25,880.8	\$117.7	\$357.8	\$2,792.4	\$132.9	\$1,765.1	\$118.7	\$353.5
Citywide Average	\$888.6	\$2,477.4	\$1,415.7	\$1,896.6	\$895.8	\$1,845.0	\$2,324.3	\$2,217.5	\$1,816.1	\$1,444.0

Percentage Change

C&I District	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06	2006-07	2007-08
Bayview	271.8	-75.7	-61.0	302.5	-47.6	204.9	-82.0	532.5	-93.5
Civic Center	12.3	491.9	-30.9	-55.1	-49.4	152.2	190.7	-96.7	207.5
Financial	-19.3	-55.9	1,397.7	-93.2	346.2	-47.5	4.1	-64.3	-75.7
Mission	40.6	-21.2	38.5	-28.6	52.3	2.8	31.0	75.9	-89.2
North Beach	-71.2	-62.2	529.4	-73.9	34.8	-27.2	-19.1	-	-
North Central	-26.8	-35.7	111.5	38.5	34.7	-91.5	3,167.0	-76.3	112.2
Northwest	28.0	66.9	-66.7	46.4	0.7	42.6	-60.3	892.1	-58.9
South of Market	222.8	-20.7	84.6	-77.0	79.8	169.7	-37.8	-15.1	18.9
Southwest	135.6	-40.9	-0.8	13.6	-39.6	-7.9	17.2	-6.1	54.9
Van Ness	109.7	173.7	-42.7	32.3	-20.6	6.7	-59.9	355.6	-73.8
Unclassified	-48.2	840.7	-99.5	203.9	680.5	-95.2	1,227.9	-93.3	197.7
Citywide Average	178.8	-42.9	34.0	-52.8	106.0	26.0	-4.6	-18.1	-20.5

Sources:

- San Francisco Planning Department
- Department of Building Inspection

**TABLE 6.2.3.A BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS
BY COMMERCE & INDUSTRY DISTRICT, 1999-2008**

This table presents the number of building permits filed for alterations and demolitions by Commerce & Industry District. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	605	719	956	788	748	617	656	655	691	603
Civic Center	726	919	819	701	814	819	764	736	956	841
Financial	3,148	4,015	3,198	2,526	2,886	3,267	3,629	3,419	3,629	3,237
Mission	1,737	1,923	1,820	2,087	2,062	2,003	1,954	2,025	1,929	1,951
North Beach	721	743	688	841	774	757	829	823	789	810
North Central	3,206	3,285	2,853	3,537	3,703	3,515	3,510	3,780	3,965	3,427
Northwest	2,214	2,360	2,065	2,254	2,400	2,550	2,453	2,443	2,357	2,447
South of Market	2,259	2,332	1,981	1,951	1,917	1,923	2,000	2,367	2,102	2,143
Southwest	8,918	8,788	8,642	9,420	9,355	9,717	9,214	9,285	9,206	8,532
Van Ness	1,044	1,103	1,054	1,008	1,109	1,095	1,025	1,152	1,467	1,153
Unclassified	897	250	385	195	96	140	117	70	124	84
TOTAL	25,475	26,437	24,461	25,308	25,864	26,403	26,151	26,755	27,215	25,228

Annual Percentage Distribution

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	2.4	2.7	3.9	3.1	2.9	2.3	2.5	2.4	2.5	2.4
Civic Center	2.8	3.5	3.3	2.8	3.1	3.1	2.9	2.8	3.5	3.3
Financial	12.4	15.2	13.1	10.0	11.2	12.4	13.9	12.8	13.3	12.8
Mission	6.8	7.3	7.4	8.2	8.0	7.6	7.5	7.6	7.1	7.7
North Beach	2.8	2.8	2.8	3.3	3.0	2.9	3.2	3.1	2.9	3.2
North Central	12.6	12.4	11.7	14.0	14.3	13.3	13.4	14.1	14.6	13.6
Northwest	8.7	8.9	8.4	8.9	9.3	9.7	9.4	9.1	8.7	9.7
South of Market	8.9	8.8	8.1	7.7	7.4	7.3	7.6	8.8	7.7	8.5
Southwest	35.0	33.2	35.3	37.2	36.2	36.8	35.2	34.7	33.8	33.8
Van Ness	4.1	4.2	4.3	4.0	4.3	4.1	3.9	4.3	5.4	4.6
Unclassified	3.5	0.9	1.6	0.8	0.4	0.5	0.4	0.3	0.5	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Bayview	18.8	33.0	-17.6	-5.1	-17.5	6.3	-0.2	5.5	-12.7
Civic Center	26.6	-10.9	-14.4	16.1	0.6	-6.7	-3.7	29.9	-12.0
Financial	27.5	-20.3	-21.0	14.3	13.2	11.1	-5.8	6.1	-10.8
Mission	10.7	-5.4	14.7	-1.2	-2.9	-2.4	3.6	-4.7	1.1
North Beach	3.1	-7.4	22.2	-8.0	-2.2	9.5	-0.7	-4.1	2.7
North Central	2.5	-13.2	24.0	4.7	-5.1	-0.1	7.7	4.9	-13.6
Northwest	6.6	-12.5	9.2	6.5	6.3	-3.8	-0.4	-3.5	3.8
South of Market	3.2	-15.1	-1.5	-1.7	0.3	4.0	18.4	-11.2	2.0
Southwest	-1.5	-1.7	9.0	-0.7	3.9	-5.2	0.8	-0.9	-7.3
Van Ness	5.7	-4.4	-4.4	10.0	-1.3	-6.4	12.4	27.3	-21.4
Unclassified	-72.1	54.0	-49.4	-50.8	45.8	-16.4	-40.2	77.1	-32.3
TOTAL	3.8	-7.5	3.5	2.2	2.1	-1.0	2.3	1.7	-7.3

Sources: San Francisco Planning Department; Department of Building Inspection

TABLE 6.2.3.B TOTAL CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 1999-2008

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by Commerce & Industry District. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	\$12,011	\$27,301	\$12,591	\$13,980	\$15,632	\$8,229	\$11,028	\$13,149	\$30,918	\$7,321
Civic Center	\$32,980	\$63,235	\$49,009	\$25,538	\$38,673	\$37,850	\$20,561	\$34,178	\$45,171	\$27,064
Financial	\$230,939	\$331,635	\$163,343	\$162,336	\$167,946	\$142,264	\$183,126	\$150,994	\$164,015	\$167,217
Mission	\$23,550	\$52,392	\$31,229	\$26,920	\$35,088	\$20,537	\$24,845	\$19,813	\$32,950	\$25,916
North Beach	\$16,322	\$22,116	\$16,531	\$18,593	\$20,206	\$20,329	\$14,581	\$22,484	\$14,920	\$14,667
North Central	\$51,157	\$62,977	\$58,463	\$55,893	\$53,492	\$27,507	\$57,844	\$75,214	\$78,197	\$52,711
Northwest	\$30,384	\$39,555	\$31,668	\$36,688	\$31,010	\$37,720	\$34,349	\$39,336	\$32,785	\$34,007
South of Market	\$283,454	\$121,360	\$76,097	\$65,617	\$69,516	\$69,449	\$70,364	\$102,406	\$182,266	\$64,476
Southwest	\$117,249	\$93,473	\$94,626	\$109,024	\$108,678	\$174,384	\$122,371	\$108,289	\$114,082	\$93,133
Van Ness	\$26,637	\$31,914	\$29,325	\$24,495	\$19,396	\$24,278	\$19,934	\$33,590	\$37,697	\$25,299
Unclassified	\$13,822	\$5,407	\$2,097	\$2,137	\$5,345	\$2,499	\$620	\$1,933	\$1,009	\$704
TOTAL	\$838,506	\$851,364	\$564,979	\$541,222	\$564,981	\$565,046	\$559,622	\$601,385	\$734,009	\$532,515

Annual Percentage Distribution

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	1.4	3.2	2.2	2.6	2.8	1.5	2.0	2.2	4.2	1.4
Civic Center	3.9	7.4	8.7	4.7	6.8	6.7	3.7	5.7	6.2	5.1
Financial	27.5	39.0	28.9	30.0	29.7	25.2	32.7	25.1	22.3	35.2
Mission	2.8	6.2	5.5	5.0	6.2	3.6	4.4	3.3	4.5	4.9
North Beach	1.9	2.6	2.9	3.4	3.6	3.6	2.6	3.7	2.0	2.8
North Central	6.1	7.4	10.3	10.3	9.5	4.9	10.3	12.5	10.7	9.9
Northwest	3.6	4.6	5.6	6.8	5.5	6.7	6.1	6.5	4.5	6.4
South of Market	33.8	14.3	13.5	12.1	12.3	12.3	12.6	17.0	24.8	12.1
Southwest	14.0	11.0	16.7	20.1	19.2	30.9	21.9	18.0	15.5	17.5
Van Ness	3.2	3.7	5.2	4.5	3.4	4.3	3.6	5.6	5.1	4.8
Unclassified	1.6	0.6	0.4	0.4	0.9	0.4	0.1	0.3	0.1	0.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Bayview	127.3	-53.9	11.0	11.8	-47.4	34.0	19.2	135.1	-76.3
Civic Center	91.7	-22.5	-47.9	51.4	-2.1	-45.7	66.2	32.2	-40.1
Financial	43.6	-50.7	-0.6	3.5	-15.3	28.7	-17.5	8.6	14.1
Mission	122.5	-40.4	-13.8	30.3	-41.5	21.0	-20.3	66.3	-21.3
North Beach	35.5	-25.3	12.5	8.7	0.6	-28.3	54.2	-33.6	-1.7
North Central	23.1	-7.2	-4.4	-4.3	-48.6	110.3	30.0	4.0	-32.6
Northwest	30.2	-19.9	15.9	-15.5	21.6	-8.9	14.5	-16.7	3.7
South of Market	-57.2	-37.3	-13.8	5.9	-0.1	1.3	45.5	78.0	-64.6
Southwest	-20.3	1.2	15.2	-0.3	60.5	-29.8	-11.5	5.3	-18.4
Van Ness	19.8	-8.1	-16.5	-20.8	25.2	-17.9	68.5	12.2	-32.9
Unclassified	-60.9	-61.2	1.9	150.1	-53.2	-75.2	211.8	-47.8	-30.2
TOTAL	1.5	-33.6	-4.2	4.4	0.0	-1.0	7.5	22.1	-27.5

Sources: San Francisco Planning Department; Department of Building Inspection

TABLE 6.2.3.C AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 1999-2008

This table presents the average construction cost for all building permits filed for alterations and demolitions by Commerce & Industry District. It represents the total costs (Table 6.2.3.A) divided by the total permits (Table 6.2.3.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Bayview	\$19.9	\$38.0	\$13.2	\$17.7	\$20.9	\$13.3	\$16.8	\$20.1	\$44.7	\$12.1
Civic Center	\$45.4	\$68.8	\$59.8	\$36.4	\$47.5	\$46.2	\$26.9	\$46.4	\$47.2	\$32.2
Financial	\$73.4	\$82.6	\$51.1	\$64.3	\$58.2	\$43.5	\$50.5	\$44.2	\$45.2	\$57.8
Mission	\$13.6	\$27.2	\$17.2	\$12.9	\$17.0	\$10.3	\$12.7	\$9.8	\$17.1	\$13.3
North Beach	\$22.6	\$29.8	\$24.0	\$22.1	\$26.1	\$26.9	\$17.6	\$27.3	\$18.9	\$18.1
North Central	\$16.0	\$19.2	\$20.5	\$15.8	\$14.4	\$7.8	\$16.5	\$19.9	\$19.7	\$15.4
Northwest	\$13.7	\$16.8	\$15.3	\$16.3	\$12.9	\$14.8	\$14.0	\$16.1	\$13.9	\$13.9
South of Market	\$125.5	\$52.0	\$38.4	\$33.6	\$36.3	\$36.1	\$35.2	\$43.3	\$86.7	\$30.1
Southwest	\$13.1	\$10.6	\$10.9	\$11.6	\$11.6	\$17.9	\$13.3	\$11.7	\$12.4	\$10.9
Van Ness	\$25.5	\$28.9	\$27.8	\$24.3	\$17.5	\$22.2	\$19.4	\$29.2	\$25.7	\$21.9
Unclassified	\$15.4	\$21.6	\$5.4	\$11.0	\$55.7	\$17.9	\$5.3	\$27.6	\$8.1	\$8.4
Citywide Average	\$32.9	\$32.2	\$23.1	\$21.4	\$21.8	\$21.4	\$21.4	\$22.5	\$27.0	\$21.1

Percentage Change

C&I District	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06	2006-07	2007-08
Bayview	91.3	-65.3	34.7	17.8	-36.2	26.0	19.4	122.9	-72.9
Civic Center	51.5	-13.0	-39.1	30.4	-2.7	-41.8	72.6	1.7	-31.9
Financial	12.6	-38.2	25.8	-9.4	-25.2	15.9	-12.5	2.3	28.0
Mission	101.0	-37.0	-24.8	31.9	-39.7	24.0	-23.1	74.6	-22.2
North Beach	31.5	-19.3	-8.0	18.1	2.9	-34.5	55.3	-30.8	-4.2
North Central	20.1	6.9	-22.9	-8.6	-45.8	110.6	20.7	-0.9	-22.0
Northwest	22.1	-8.5	6.1	-20.6	14.5	-5.3	15.0	-13.6	-0.1
South of Market	-58.5	-26.2	-12.4	7.8	-0.4	-2.6	23.0	100.4	-65.3
Southwest	-19.1	2.9	5.7	0.4	54.5	-26.0	-12.2	6.3	-11.9
Van Ness	13.4	-3.8	-12.7	-28.0	26.8	-12.3	49.9	-11.9	-14.6
Unclassified	40.4	-74.8	101.2	408.1	-67.9	-70.3	421.1	-70.5	3.0
Citywide Average	-2.2	-28.3	-7.4	2.1	-2.0	-0.0	5.0	20.0	-21.7

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.3.A PERMIT APPLICATIONS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2008

This table presents the permit applications for 2008 by both Commerce & Industry District and Land Use Category. Also included is the percentage distribution in any given by both land use category and Commerce & Industry District.

Number of Permits

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	33	46	53	0	24	430	49	635
Civic Center	175	118	2	94	62	390	56	897
Financial	2,428	349	7	75	46	323	141	3,369
Mission	75	154	21	17	24	1,647	46	1,984
North Beach	91	90	5	11	19	590	32	838
North Central	68	205	7	18	129	2,985	87	3,499
Northwest	43	102	7	1	51	2,227	54	2,485
South of Market	675	389	99	59	56	863	113	2,254
Southwest	130	340	28	5	150	7,853	164	8,670
Van Ness	69	132	4	30	35	875	47	1,192
Unclassified	4	2	2	0	6	43	30	87
TOTAL	3,791	1,927	235	310	602	18,226	819	25,910

Percentage Distribution by C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	0.9	2.4	22.6	0.0	4.0	2.4	6.0	2.5
Civic Center	4.6	6.1	0.9	30.3	10.3	2.1	6.8	3.5
Financial	64.0	18.1	3.0	24.2	7.6	1.8	17.2	13.0
Mission	2.0	8.0	8.9	5.5	4.0	9.0	5.6	7.7
North Beach	2.4	4.7	2.1	3.5	3.2	3.2	3.9	3.2
North Central	1.8	10.6	3.0	5.8	21.4	16.4	10.6	13.5
Northwest	1.1	5.3	3.0	0.3	8.5	12.2	6.6	9.6
South of Market	17.8	20.2	42.1	19.0	9.3	4.7	13.8	8.7
Southwest	3.4	17.6	11.9	1.6	24.9	43.1	20.0	33.5
Van Ness	1.8	6.9	1.7	9.7	5.8	4.8	5.7	4.6
Unclassified	0.1	0.1	0.9	0.0	1.0	0.2	3.7	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	5.2	7.2	8.3	0.0	3.8	67.7	7.7	100.0
Civic Center	19.5	13.2	0.2	10.5	6.9	43.5	6.2	100.0
Financial	72.1	10.4	0.2	2.2	1.4	9.6	4.2	100.0
Mission	3.8	7.8	1.1	0.9	1.2	83.0	2.3	100.0
North Beach	10.9	10.7	0.6	1.3	2.3	70.4	3.8	100.0
North Central	1.9	5.9	0.2	0.5	3.7	85.3	2.5	100.0
Northwest	1.7	4.1	0.3	0.0	2.1	89.6	2.2	100.0
South of Market	29.9	17.3	4.4	2.6	2.5	38.3	5.0	100.0
Southwest	1.5	3.9	0.3	0.1	1.7	90.6	1.9	100.0
Van Ness	5.8	11.1	0.3	2.5	2.9	73.4	3.9	100.0
Unclassified	4.6	2.3	2.3	0.0	6.9	49.4	34.5	100.0
TOTAL	14.6	7.4	0.9	1.2	2.3	70.3	3.2	100.0

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational
 Sources: San Francisco Planning Department; Department of Building Inspection

TABLE 6.3.B TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2008

This table presents the total construction cost for all permit applications for 2008 by both Commerce & Industry District and Land Use Category. Also included is the percentage distribution in any given by both land use category and Commerce & Industry District.

Total Construction Costs (2008 \$ 000s)

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	\$3,142	\$1,266	\$3,494	\$0	\$3,056	\$9,617	\$303	\$20,878
Civic Center	\$12,634	\$8,981	\$13	\$9,879	\$4,992	\$33,834	\$322	\$70,655
Financial	\$246,541	\$31,896	\$82	\$19,085	\$17,247	\$105,037	\$4,336	\$424,224
Mission	\$12,963	\$4,479	\$745	\$71	\$5,008	\$37,412	\$205	\$60,883
North Beach	\$5,633	\$3,754	\$303	\$4,987	\$672	\$21,056	\$180	\$36,585
North Central	\$11,593	\$5,892	\$4,134	\$381	\$18,577	\$150,139	\$1,351	\$192,067
Northwest	\$2,184	\$3,506	\$263	\$0	\$6,117	\$79,030	\$230	\$91,330
South of Market	\$205,758	\$78,830	\$16,732	\$3,630	\$8,266	\$56,232	\$2,151	\$371,599
Southwest	\$8,534	\$14,556	\$416	\$93	\$33,217	\$210,306	\$2,282	\$269,404
Van Ness	\$2,379	\$7,208	\$69	\$344	\$17,107	\$33,193	\$194	\$60,794
Unclassified	\$155	\$210	\$11	\$0	\$791	\$1,941	\$0	\$3,108
TOTAL	\$511,516	\$160,578	\$26,262	\$38,770	\$115,050	\$737,797	\$11,554	\$1,601,527

Annual Percentage Distribution by C&I District

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	0.6	0.8	13.3	0.0	2.7	1.3	2.6	1.3
Civic Center	2.5	5.6	0.0	25.5	4.3	4.6	2.8	4.4
Financial	48.2	19.9	0.3	49.2	15.0	14.2	37.5	26.5
Mission	2.5	2.8	2.8	0.2	4.4	5.1	1.8	3.8
North Beach	1.1	2.3	1.2	12.9	0.6	2.9	1.6	2.3
North Central	2.3	3.7	15.7	1.0	16.1	20.3	11.7	12.0
Northwest	0.4	2.2	1.0	0.0	5.3	10.7	2.0	5.7
South of Market	40.2	49.1	63.7	9.4	7.2	7.6	18.6	23.2
Southwest	1.7	9.1	1.6	0.2	28.9	28.5	19.8	16.8
Van Ness	0.5	4.5	0.3	1.7	14.9	4.5	1.7	3.8
Unclassified	0.0	0.1	0.0	0.0	0.7	0.3	0.0	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Annual Percentage Distribution by Land Use Category

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	TOTAL
Bayview	15.0	6.1	16.7	0.0	14.6	46.1	1.5	100.0
Civic Center	17.9	12.7	0.0	14.0	7.1	47.9	0.5	100.0
Financial	58.1	7.5	0.0	4.5	4.1	24.8	1.0	100.0
Mission	21.3	7.4	1.2	0.1	8.2	61.4	0.3	100.0
North Beach	15.4	10.3	0.8	13.6	1.8	57.6	0.5	100.0
North Central	6.0	3.1	2.2	0.2	9.7	78.2	0.7	100.0
Northwest	2.4	3.8	0.3	0.0	6.7	86.5	0.3	100.0
South of Market	55.4	21.2	4.5	1.0	2.2	15.1	0.6	100.0
Southwest	3.2	5.4	0.2	0.0	12.3	78.1	0.8	100.0
Van Ness	3.9	11.9	0.1	1.1	28.1	54.6	0.3	100.0
Unclassified	5.0	6.8	0.4	0.0	25.5	62.5	0.0	100.0
TOTAL	31.9	10.0	1.6	2.4	7.2	46.1	0.7	100.0

Notes: PDR = Production/Distribution/Repair; CIE = Cultural/Institutional/Educational
 Sources: San Francisco Planning Department; Department of Building Inspection

**TABLE 6.3.C AVERAGE CONSTRUCTION COSTS FOR ALL PERMITS
BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2008**

This table presents the average construction cost for all permit applications for 2008 by both Commerce & Industry District and Land Use Category. It represents the total costs (Table 6.3.A) divided by the total permits (Table 6.3.B).

Average Construction Costs (2008 \$ 000s)

C&I District	Office	Retail	PDR	Hotel	CIE	Residential	Other	Average
Bayview	\$95.2	\$27.5	\$65.9	\$0.0	\$127.3	\$22.4	\$6.2	\$57.4
Civic Center	\$72.2	\$76.1	\$6.5	\$105.1	\$80.5	\$86.8	\$5.8	\$61.8
Financial	\$101.5	\$91.4	\$11.7	\$254.5	\$374.9	\$325.2	\$30.8	\$170.0
Mission	\$172.8	\$29.1	\$35.5	\$4.2	\$208.7	\$22.7	\$4.5	\$68.2
North Beach	\$61.9	\$41.7	\$60.6	\$453.4	\$35.4	\$35.7	\$5.6	\$99.2
North Central	\$170.5	\$28.7	\$590.6	\$21.2	\$144.0	\$50.3	\$15.5	\$145.8
Northwest	\$50.8	\$34.4	\$37.6	\$0.0	\$119.9	\$35.5	\$4.3	\$40.3
South of Market	\$304.8	\$202.6	\$169.0	\$61.5	\$147.6	\$65.2	\$19.0	\$138.5
Southwest	\$65.6	\$42.8	\$14.9	\$18.6	\$221.4	\$26.8	\$13.9	\$57.7
Van Ness	\$34.5	\$54.6	\$17.3	\$21.5	\$488.8	\$37.9	\$4.1	\$94.1
Unclassified	\$38.8	\$105.0	\$5.5	\$0.0	\$131.8	\$45.1	\$0.0	\$54.4
Citywide Average	\$134.9	\$83.8	\$111.8	\$125.1	\$191.1	\$40.5	\$14.1	\$100.1

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.1.A ALL BUILDING PERMITS BY LAND USE CATEGORY AND PERMIT STATUS, 2008

This table presents the status of building permits by Land Use Category. Also included is the percentage distribution by Land Use Category and by permit status.

Number of Permits

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	12	2	2,517	1,098	162	3,791
Retail	17	2	922	832	154	1,927
PDR	3	0	94	119	19	235
Hotel	2	0	121	171	16	310
CIE	8	1	279	263	51	602
Residential	69	6	10,331	6,851	969	18,226
Other	5	2	220	368	224	819
TOTAL	116	13	14,484	9,702	1,595	25,910

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	10.3	15.4	17.4	11.3	10.2	14.6
Retail	14.7	15.4	6.4	8.6	9.7	7.4
PDR	2.6	0.0	0.6	1.2	1.2	0.9
Hotel	1.7	0.0	0.8	1.8	1.0	1.2
CIE	6.9	7.7	1.9	2.7	3.2	2.3
Residential	59.5	46.2	71.3	70.6	60.8	70.3
Other	4.3	15.4	1.5	3.8	14.0	3.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.3	0.1	66.4	29.0	4.3	100.0
Retail	0.9	0.1	47.8	43.2	8.0	100.0
PDR	1.3	0.0	40.0	50.6	8.1	100.0
Hotel	0.6	0.0	39.0	55.2	5.2	100.0
CIE	1.3	0.2	46.3	43.7	8.5	100.0
Residential	0.4	0.0	56.7	37.6	5.3	100.0
Other	0.6	0.2	26.9	44.9	27.4	100.0
TOTAL	0.4	0.1	55.9	37.4	6.2	100.0

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.1.B TOTAL CONSTRUCTION COSTS BY LAND USE CATEGORY AND PERMIT STATUS, 2008

This table presents the construction cost of building permits by Land Use Category and by permit status. Also included is the percentage distribution by Land Use Category and by permit status.

Total Construction Costs (2008 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$1,600	\$65	\$216,393	\$123,109	\$170,349	\$511,516
Retail	\$7,043	\$125	\$52,576	\$88,035	\$12,798	\$160,577
PDR	\$450	\$0	\$3,391	\$18,783	\$3,637	\$26,261
Hotel	\$18	\$0	\$10,974	\$26,434	\$1,345	\$38,771
CIE	\$6,453	\$60	\$20,351	\$53,615	\$34,572	\$115,051
Residential	\$13,449	\$135	\$168,106	\$269,329	\$286,781	\$737,800
Other	\$1,027	\$3	\$2,980	\$7,025	\$520	\$11,555
TOTAL	\$30,040	\$388	\$474,771	\$586,330	\$510,002	\$1,601,531

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	5.3	16.8	45.6	21.0	33.4	31.9
Retail	23.4	32.2	11.1	15.0	2.5	10.0
PDR	1.5	0.0	0.7	3.2	0.7	1.6
Hotel	0.1	0.0	2.3	4.5	0.3	2.4
CIE	21.5	15.5	4.3	9.1	6.8	7.2
Residential	44.8	34.8	35.4	45.9	56.2	46.1
Other	3.4	0.8	0.6	1.2	0.1	0.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.3	0.0	42.3	24.1	33.3	100.0
Retail	4.4	0.1	32.7	54.8	8.0	100.0
PDR	1.7	0.0	12.9	71.5	13.8	100.0
Hotel	0.0	0.0	28.3	68.2	3.5	100.0
CIE	5.6	0.1	17.7	46.6	30.0	100.0
Residential	1.8	0.0	22.8	36.5	38.9	100.0
Other	8.9	0.0	25.8	60.8	4.5	100.0
TOTAL	1.9	0.0	29.6	36.6	31.8	100.0

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.1.C AVERAGE CONSTRUCTION COSTS BY LAND USE CATEGORY AND PERMIT STATUS, 2008

This table presents the average construction cost for all permit applications for 2008 by both Land Use Category and permit status. It represents the total costs (Table 6.4.1.A) divided by the total permits (Table 6.4.1.B).

Average Construction Costs (2008 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$133.3	\$32.5	\$86.0	\$112.1	\$1,051.5	\$134.9
Retail	\$414.3	\$62.5	\$57.0	\$105.8	\$83.1	\$83.3
PDR	\$150.0	-	\$36.1	\$157.8	\$191.4	\$111.7
Hotel	\$9.0	-	\$90.7	\$154.6	\$84.1	\$125.1
CIE	\$806.6	\$60.0	\$72.9	\$203.9	\$677.9	\$191.1
Residential	\$194.9	\$22.5	\$16.3	\$39.3	\$296.0	\$40.5
Other	\$204.5	\$1.5	\$13.5	\$19.1	\$2.3	\$14.1
TOTAL	\$259.0	\$29.8	\$32.8	\$60.4	\$319.8	\$61.8

Notes:

- PDR = Production/Distribution/Repair
- CIE = Cultural/Institutional/Educational
- Other represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.2.A BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2008

This table presents the status of building permits by Commerce & Industry District. Also included is the percentage distribution by Commerce & Industry District and by permit status.

Number of Permits

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	2	0	306	279	48	635
Civic Center	7	1	483	357	49	897
Financial	6	3	2,144	1,069	147	3,369
Mission	10	0	1,087	755	132	1,984
North Beach	6	3	456	307	66	838
North Central	14	1	1,881	1,403	200	3,499
Northwest	8	2	1,415	900	160	2,485
South of Market	15	1	1,078	969	191	2,254
Southwest	42	2	4,969	3,200	457	8,670
Van Ness	6	0	650	452	84	1,192
Unclassified	0	0	15	11	61	87
TOTAL	116	13	14,484	9,702	1,595	25,910

Percentage Distribution by C&I District

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	0.0	2.1	2.9	3.0	2.5	2.6
Civic Center	6.0	7.7	3.3	3.7	3.1	3.5
Financial	5.2	23.1	14.8	11.0	9.2	13.0
Mission	8.6	0.0	7.5	7.8	8.3	7.7
North Beach	5.2	23.1	3.1	3.2	4.1	3.2
North Central	12.1	7.7	13.0	14.5	12.5	13.5
Northwest	6.9	15.4	9.8	9.3	10.0	9.6
South of Market	12.9	7.7	7.4	10.0	12.0	8.7
Southwest	36.2	15.4	34.3	33.0	28.7	33.5
Van Ness	5.2	0.0	4.5	4.7	5.3	4.6
Unclassified	0.0	0.0	0.1	0.1	3.8	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	0.3	0.0	48.2	43.9	7.6	100.0
Civic Center	0.8	0.1	53.8	39.8	5.5	100.0
Financial	0.2	0.1	63.6	31.7	4.4	100.0
Mission	0.5	0.0	54.8	38.1	6.7	100.0
North Beach	0.7	0.4	54.4	36.6	7.9	100.0
North Central	0.4	0.0	53.8	40.1	5.7	100.0
Northwest	0.3	0.1	56.9	36.2	6.4	100.0
South of Market	0.7	0.0	47.8	43.0	8.5	100.0
Southwest	0.5	0.0	57.3	36.9	5.3	100.0
Van Ness	0.5	0.0	54.5	37.9	7.0	100.0
Unclassified	0.0	0.0	17.2	12.6	70.1	100.0
TOTAL	0.4	0.1	55.9	37.4	6.2	100.0

Note:

* Other represents those permits still in the pipeline

Sources:

* San Francisco Planning Department
* Department of Building Inspection

TABLE 6.4.2.B TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2008

This table presents the construction cost of building permits by Commerce & Industry District and by permit status. Also included is the percentage distribution by Commerce & Industry District and by permit status.

Total Construction Costs (2008 \$ 000s)

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	\$520	\$0	\$5,762	\$10,148	\$4,448	\$120,878
Civic Center	\$3,462	\$2	\$19,573	\$31,590	\$16,027	\$70,654
Financial	\$806	\$98	\$186,707	\$121,601	\$115,013	\$424,225
Mission	\$798	\$0	\$15,678	\$33,660	\$10,747	\$60,883
North Beach	\$381	\$133	\$20,072	\$9,260	\$6,739	\$36,585
North Central	\$3,712	\$2	\$36,570	\$127,515	\$24,269	\$192,068
Northwest	\$1,207	\$63	\$27,903	\$28,213	\$33,943	\$91,329
South of Market	\$8,279	\$0	\$62,444	\$120,798	\$180,079	\$371,600
Southwest	\$8,409	\$90	\$81,440	\$86,205	\$93,260	\$269,404
Van Ness	\$2,465	\$0	\$18,090	\$16,627	\$23,612	\$60,794
Unclassified	\$0	\$0	\$532	\$712	\$1,864	\$3,108
TOTAL	\$30,039	\$388	\$474,771	\$586,329	\$510,001	\$1,601,528

Percentage Distribution by C&I District

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	1.7	0.0	1.2	1.7	0.9	1.3
Civic Center	11.5	0.5	4.1	5.4	3.1	4.4
Financial	2.7	25.3	39.3	20.7	22.6	26.5
Mission	2.7	0.0	3.3	5.7	2.1	3.8
North Beach	1.3	34.3	4.2	1.6	1.3	2.3
North Central	12.4	0.5	7.7	21.7	4.8	12.0
Northwest	4.0	16.2	5.9	4.8	6.7	5.7
South of Market	27.6	0.0	13.2	20.6	35.3	23.2
Southwest	28.0	23.2	17.2	14.7	18.3	16.8
Van Ness	8.2	0.0	3.8	2.8	4.6	3.8
Unclassified	0.0	0.0	0.1	0.1	0.4	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	2.5	0.0	27.6	48.6	21.3	100.0
Civic Center	4.9	0.0	27.7	44.7	22.7	100.0
Financial	0.2	0.0	44.0	28.7	27.1	100.0
Mission	1.3	0.0	25.8	55.3	17.7	100.0
North Beach	1.0	0.4	54.9	25.3	18.4	100.0
North Central	1.9	0.0	19.0	66.4	12.6	100.0
Northwest	1.3	0.1	30.6	30.9	37.2	100.0
South of Market	2.2	0.0	16.8	32.5	48.5	100.0
Southwest	3.1	0.0	30.2	32.0	34.6	100.0
Van Ness	4.1	0.0	29.8	27.3	38.8	100.0
Unclassified	0.0	0.0	17.1	22.9	60.0	100.0
TOTAL	1.9	0.0	29.6	36.6	31.8	100.0

Note:
• Other represents those permits still in the pipeline.

Sources:
• San Francisco Planning Department
• Department of Building Inspection

TABLE 6.4.2.C AVERAGE CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2008

This table presents the average construction cost for all permit applications for 2008 by both Commerce & Industry District and permit status. It represents the total costs (Table 6.4.1.A) divided by the total permits (Table 6.4.1.B).

Average Construction Costs (2008 \$ 000s)

C&I District	Approved	Canceled	Completed	Issued	Other	TOTAL
Bayview	\$260.0	-	\$18.8	\$36.4	\$92.7	\$32.9
Civic Center	\$494.6	\$2.0	\$40.5	\$88.5	\$327.1	\$78.8
Financial	\$134.3	\$32.7	\$87.1	\$113.8	\$782.4	\$125.9
Mission	\$79.8	-	\$14.4	\$44.6	\$81.4	\$30.7
North Beach	\$63.5	\$44.3	\$44.0	\$30.2	\$102.1	\$43.7
North Central	\$265.1	\$2.0	\$19.4	\$90.9	\$121.3	\$54.9
Northwest	\$150.9	\$31.5	\$19.7	\$31.3	\$212.1	\$36.8
South of Market	\$551.9	-	\$57.9	\$124.7	\$942.8	\$164.9
Southwest	\$200.2	\$45.0	\$16.4	\$26.9	\$204.1	\$31.1
Van Ness	\$410.8	-	\$27.8	\$36.8	\$281.1	\$51.0
Unclassified	-	-	\$35.5	\$64.7	\$30.6	\$35.7
TOTAL	\$259.0	\$29.8	\$32.8	\$60.4	\$319.7	\$61.8

Note:

- Other represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.5 TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 1999-2008

This table presents the total existing office space in the central and non-central business districts over the last ten years. It also conveys the percent change by year. This information is presented graphically in Figure 6.5.

Building Square Footage (000s)

Location	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Central Business District	42,727	44,326	43,904	45,663	48,192	48,198	46,719	46,956	47,026	48,084
Non-Central Business District	21,171	21,941	22,137	24,968	22,622	22,686	22,845	22,932	22,996	24,300
TOTAL	63,899	66,267	66,041	70,631	70,814	70,884	69,564	69,888	70,022	72,384

Percentage Change

Location	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Central Business District	3.7	-1.0	4.0	5.5	0.0	-3.1	0.5	0.1	2.3
Non-Central Business District	3.6	0.9	12.8	-9.4	0.3	0.7	0.4	0.3	5.7
TOTAL	3.7	-0.3	7.0	0.3	0.1	-1.9	0.5	0.2	3.4

Note:

- Office Space includes large commercial buildings of 25,000 rentable square feet or larger in the Central and Non-Central Business Districts, which are defined below. Not included are government, medical, and owner occupied buildings.
- The Central Business District includes the Financial District areas both north and south of Market Street.
- The Non-Central Business District includes Jackson Square, North Waterfront, Yerba Buena, South of Market, West of Kearny, West of Van Ness Corridor, Van Ness, and Union Square.

Sources:

- Cushman & Wakefield of California Research Services
- San Francisco Planning Department

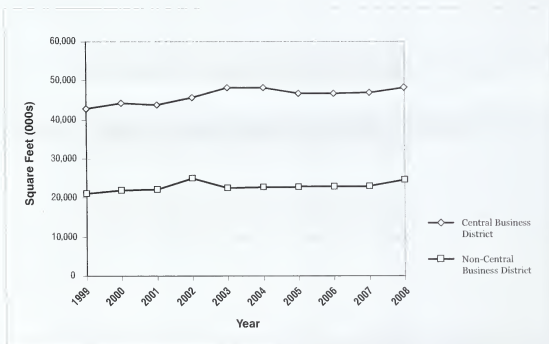
FIGURE 6.5 TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 1999-2008

TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2008

This table conveys the area square footage for each land use category for the 21 plan areas in San Francisco. These plan areas are shown in Map 6.6.

Land Square Footage (000s)

Plan Area	Residential	Mixed Resid	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	288.5	214.0	12.7	1,589.8	39.8	611.8	0.0	133.5	1,210.4	3,638.2	0.0	7,738.7
Bayview	17,839.4	990.9	2,042.0	1,530.0	18,409.2	10,763.2	21.7	993.8	7,992.2	13,145.1	149.0	73,875.6
C-3	171.7	508.3	3,468.7	1,131.5	353.1	406.1	749.9	1,404.9	226.9	422.2	51.6	8,894.8
Central Waterfront	359.0	374.9	609.6	321.7	9,542.1	39.4	0.0	279.6	3,428.8	3,322.9	0.0	18,278.0
East Soma	922.8	1,794.2	1,287.3	513.1	1,556.1	89.6	51.0	774.5	712.3	1,398.0	22.6	9,121.5
Geary	12,939.3	726.5	184.9	1,464.9	204.6	2,538.2	163.6	485.3	730.1	492.8	0.0	19,930.2
Hunters Point Shipyard	0.0	0.0	0.0	0.0	101.6	0.0	0.0	30,889.6	0.0	3,960.7	0.0	34,992.0
Market/Octavia	5,029.0	1,124.0	925.8	838.3	443.8	1,301.8	57.6	420.0	565.1	1,053.1	1.0	11,759.6
Mid-Market	41.9	256.8	625.6	216.1	140.2	109.5	123.5	241.1	54.2	432.5	43.6	2,285.1
Mission	11,640.7	2,370.8	623.9	1,929.0	3,001.1	1,674.1	30.9	1,174.6	637.6	1,552.6	0.0	24,635.4
Mission Bay	1,694.6	1,744.9	0.0	341.9	298.8	173.7	0.0	48.4	225.1	6,414.9	510.6	11,452.9
Port	0.0	0.0	472.1	206.4	5,350.1	0.0	0.0	0.0	22,669.7	3,714.5	0.0	32,412.8
Presidio	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	65,584.0	0.0	0.0	65,584.0
Rest of the City	350,090.6	39,699.0	4,161.1	12,535.0	1,953.9	36,816.3	1,717.4	3,863.8	162,196.7	29,777.9	21,119.2	683,930.9
Rincon Hill	256.3	260.0	444.9	126.0	26.6	67.5	0.0	36.7	0.0	247.2	0.0	1,465.3
Showplace Sq/Potrero Hill	7,640.3	447.6	809.2	1,005.7	2,631.5	2,160.5	0.0	880.4	691.1	3,374.3	180.8	19,821.6
Transbay	28.0	16.1	543.9	145.3	215.6	5.0	0.0	21.4	0.0	722.6	3.6	1,701.6
Van Ness	703.8	542.9	208.0	409.1	298.9	220.0	201.7	336.9	0.0	97.4	0.0	3,018.7
Visitacion Valley	8,229.2	232.3	13.1	95.8	1,185.9	299.8	0.0	10.8	595.8	1,191.5	109.1	11,953.2
West Soma	934.7	673.1	982.8	1,013.3	2,610.0	217.1	52.8	797.0	10.2	1,455.9	17.1	8,763.9
Yerba Buena	35.2	185.6	208.0	351.2	7.4	184.5	193.4	128.9	330.0	580.9	0.0	2,205.1
TOTAL	418,944.2	52,162.1	17,623.4	25,764.3	48,370.4	57,678.1	3,363.4	42,921.4	267,860.1	76,995.2	22,208.1	1,033,790.7

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TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2008 (CONTINUED)

Percentage Distribution by Planning Area												
Plan Area	Residential	Mixed Resid	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	3.7	2.8	0.2	20.5	0.5	7.9	0.0	1.7	15.6	47.0	0.0	100.0
Bayview	24.1	1.3	2.8	2.1	24.9	14.6	0.0	1.3	10.8	17.8	0.2	100.0
C-3	1.9	5.7	39.0	12.7	4.0	4.6	8.4	15.8	2.6	4.7	0.6	100.0
Central Waterfront	2.0	2.1	3.3	1.8	52.2	0.2	0.0	1.5	18.8	18.2	0.0	100.0
East Soma	10.1	19.7	14.1	5.6	17.1	1.0	0.6	8.5	7.8	15.3	0.2	100.0
Geary	64.9	3.6	0.9	7.4	1.0	12.7	0.8	2.4	3.7	2.5	0.0	100.0
Hunters Point Shipyard	0.0	0.0	0.0	0.0	0.3	0.0	0.0	88.4	0.0	11.3	0.0	100.0
Market/Octavia	42.8	9.6	7.9	7.1	3.8	11.1	0.5	3.6	4.8	9.0	0.0	100.0
Mid-Market	1.8	11.2	27.4	9.5	6.1	4.8	5.4	10.6	2.4	18.9	1.9	100.0
Mission	47.3	9.6	2.5	7.8	12.2	6.8	0.1	4.8	2.6	6.3	0.0	100.0
Mission Bay	14.8	15.2	0.0	3.0	2.6	1.5	0.0	0.4	2.0	56.0	4.5	100.0
Port	0.0	0.0	1.5	0.6	16.5	0.0	0.0	0.0	69.9	11.5	0.0	100.0
Presidio	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	100.0
Rest of the City	52.7	6.0	0.6	1.9	0.3	5.5	0.3	0.6	24.4	4.5	3.2	100.0
Rincon Hill	17.5	17.7	30.4	8.6	1.8	4.6	0.0	2.5	0.0	16.9	0.0	100.0
Showplace Sq/Potrero Hill	38.5	2.3	4.1	5.1	13.3	10.9	0.0	4.4	3.5	17.0	0.9	100.0
Transbay	1.6	0.9	32.0	8.5	12.7	0.3	0.0	1.3	0.0	42.5	0.2	100.0
Van Ness	23.3	18.0	6.9	13.6	9.9	7.3	6.7	11.2	0.0	3.2	0.0	100.0
Visitation Valley	68.8	1.9	0.1	0.8	9.9	2.5	0.0	0.1	5.0	10.0	0.9	100.0
West Soma	10.7	7.7	11.2	11.6	29.8	2.5	0.6	9.1	0.1	16.6	0.2	100.0
Yerba Buena	1.6	8.4	9.4	15.9	0.3	8.4	8.8	5.8	15.0	26.3	0.0	100.0
TOTAL	40.5	5.0	1.7	2.5	4.7	5.6	0.3	4.2	25.9	7.4	2.1	100.0

CONTINUED >

TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2008 (CONTINUED)

Percentage Distribution by Land Use Category

Plan Area	Residential	Mixed Resid.	Office	Retail	PDR	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	0.1	0.4	0.1	6.2	0.1	1.1	0.0	0.3	0.5	4.7	0.0	0.7
Bayview	4.3	1.9	11.6	5.9	38.1	18.7	0.6	2.3	3.0	17.1	0.7	7.1
C-3	0.0	1.0	19.7	4.4	0.7	0.7	22.3	3.3	0.1	0.5	0.2	0.9
Central Waterfront	0.1	0.7	3.5	1.2	19.7	0.1	0.0	0.7	1.3	4.3	0.0	1.8
East Soma	0.2	3.4	7.3	2.0	3.2	0.2	1.5	1.8	0.3	1.8	0.1	0.9
Geary	3.1	1.4	1.0	5.7	0.4	4.4	4.9	1.1	0.3	0.6	0.0	1.9
Hunters Point Shipyard	0.0	0.0	0.0	0.0	0.2	0.0	0.0	72.0	0.0	5.1	0.0	3.4
Market/Octavia	1.2	2.2	5.3	3.3	0.9	2.3	1.7	1.0	0.2	1.4	0.0	1.1
Mid-Market	0.0	0.5	3.5	0.8	0.3	0.2	3.7	0.6	0.0	0.6	0.2	0.2
Mission	2.8	4.5	3.5	7.5	6.2	2.9	0.9	2.7	0.2	2.0	0.0	2.4
Mission Bay	0.4	3.3	0.0	1.3	0.6	0.3	0.0	0.1	0.1	8.3	2.3	1.1
Port	0.0	0.0	2.7	0.8	11.1	0.0	0.0	0.0	8.5	4.8	0.0	3.1
Presidio	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	24.5	0.0	0.0	6.3
Rest of the City	83.6	76.1	23.6	48.7	4.0	63.8	51.1	9.0	60.6	38.7	95.1	64.2
Rincon Hill	0.1	0.5	2.5	0.5	0.1	0.1	0.0	0.1	0.3	0.3	0.0	0.1
Showplace Sq/Potrero Hill	1.8	0.9	4.6	3.9	5.4	3.7	0.0	2.1	0.3	4.4	0.8	1.9
Transbay	0.0	0.0	3.1	0.6	0.4	0.0	0.0	0.0	0.0	0.9	0.0	0.2
Van Ness	0.2	1.0	1.2	1.6	0.6	0.4	6.0	0.8	0.0	0.1	0.0	0.3
Visitation Valley	2.0	0.4	0.1	0.4	2.5	0.5	0.0	0.0	0.2	1.5	0.5	1.2
West Soma	0.2	1.3	5.6	3.9	5.4	0.4	1.6	1.9	0.0	1.9	0.1	0.8
Yerba Buena	0.0	0.4	1.2	1.4	0.0	0.3	5.7	0.3	0.1	0.8	0.0	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes

* Public/OS = Public and Open Space, PDR = Production/Distribution/Repair, CIE = Cultural/Institutional/Educational

Sources

- San Francisco Office of the Assessor/Recorder
- San Francisco Planning Department
- Dun & Bradstreet



**Planning Department Plan Areas
San Francisco 2008**

0 Miles
MAP 6.1

7.0 TRANSPORTATION

The primary purpose of this chapter on transportation is to systematically track and publish information on transportation trends in San Francisco. While there are a number of ways of measuring trends in urban mobility in this city, for consistency, this chapter presents much of the same type of transportation data collected as part of the *Downtown Plan Monitoring Report*. The *Downtown Plan Monitoring Report* is an assessment of the effectiveness of the *Downtown Plan*, prepared every five years as mandated in Chapter 10E of the San Francisco Administrative Code. This chapter tracks changes in transportation trends and provides recent data in the following areas:

- Mode split;
- Parking entitlements;
- Vehicle occupancy;
- Transit service; and
- Transit Impact Development Fee (TIDF) revenues.

The transportation data presented in this chapter come from a number of government agency sources, primarily the Planning Department and Metropolitan Transportation Agency (MTA), but also the American Community Survey, a service of the U.S. Census Bureau. For the purposes of this chapter, data are reported on an annual or biennial basis, either as part of a larger series of thematic reports or as a stand-alone set of data specifically compiled for this inventory report.

7.1 MODE SPLIT

Daily commuters access San Francisco through a number of different transportation modes, including single occupant vehicle (or drive alone); carpool or vanpool; public transit; walking; bicycle; and other modes (e.g., motorcycles, taxicabs). In addition, an increasing number of commuters regularly work at home at least one day a week.

Local trends in commute mode share over the past eight years are contained in Table 7.1 below. Data is provided for both San Francisco residents working in all locations (residents), as well as San Francisco employees either residing in San Francisco County or another county in the region (employees). This data includes biennial mode splits from 2000 through 2008; however, data for employees was available only from 2004 to 2008.

- *Table 7.1 Mode Split for Commuters, 2000 - 2008*
 - Less than 39% of San Francisco's residents and workers drive alone to work. Substantial increases in walking and bicycling to work, and a slight increase in transit use occurred between 2004 and 2008. Working from home dipped slightly in 2008 for both residents and employees.

7.2 PARKING ENTITLEMENTS

Studies have shown that the volume and nature of travel is influenced by the availability and price of parking. Where parking is cheap and available, employees tend to drive to work, rather than seek other alternatives. However, where parking is more expensive and alternatives are available, commuters tend to use alternative modes some of the time.

For the purposes of this chapter, annual parking entitlements were generated from the Planning Department database. This data reflects the number of off-street parking spaces approved by the city as part of the permit approval process. On an annual basis, new data on parking entitlements will be provided in this section.

The parking entitlement data are included in Table 7.2. The total number of projects and corresponding parking spaces for calendar years 2004 through 2008 are listed by zoning district.

- *Table 7.2 Parking Entitlements, 2004-2008* — Parking entitlements, similar to building permits, tend to fluctuate greatly based on large projects. In 2008, parking spaces in projects increased 73% over those in 2007. The number of projects with parking was up 56%. One-third of the 2008 parking spaces were in RM-1 (Residential, Mixed, Low Density) district with another 30% in C-3 (Downtown Commercial) and P (Public) districts.

7.3 VEHICLE OCCUPANCY

This indicator measures the average number of individuals per private vehicle during critical periods of the day, when traffic congestion is at its highest (e.g., peak commute periods). The primary source for local vehicle occupancy rates is the American Community Survey (ACS) undertaken by the U.S. Bureau of the Census.

This survey estimated the number of individuals commuting to work and their principal modes of travel: drive alone, carpool, public transit, bicycle, walk and other. In order to compute the average vehicle occupancy, the ACS takes the number of commuters arriving by private vehicle (drive alone or carpool/vanpool) and divides by the number of private vehicles.

The data is presented in Table 7.3.

- *Table 7.3 Private Vehicle Occupancy in San Francisco, 2000-2008* — The private vehicle occupancy rate rose 2.7% from 2006 to 2008 after staying relatively constant from 2000 to 2004.

7.4 TRANSIT SERVICE LEVELS

Levels of transit service are commonly expressed in terms of transit ridership along a specific line or in specific service areas. In this case, MUNI, the transit operating division of the MTA, provides periodic ridership volumes for all of its lines. These data, covering average daily volumes during Fiscal Years 2004-05 and 2006-2007, are reported in Table 7.4. This table provides ridership data for all of MUNI's existing transit routes throughout the city, including trolley and motorcoach bus service as well as light rail service. No information was available for 2008.

- *Table 7.4 Transit Ridership on MUNI Lines, 2005-2007* — While the overall ridership is down 2.6% between 2005 and 2007, MTA believes the 2007 numbers are more accurate, because a number of transit vehicles have been equipped with automated passenger counters. In 2007, the two busiest transit lines were the 38-Geary and the N-Judah with 56,473 and 40,500 riders respectively. In addition, the 2007 ridership was up on these two lines: the N-Judah increasing by 14.2% and the 38-Geary line by 10.5%.

7.5 TIDF REVENUES

The MTA Finance Division assembles data on the volume of revenue collected from the Transit Impact Development Fee (TIDF). These fees, which are collected from building applicants just prior to the issuance of a certificate of occupancy, are subsequently deposited into an account for use by the MTA. Historically, data have indicated wide variations in the volume of revenues collected each year, depending on the number and size of projects approved.

The TIDF has been in effect in San Francisco since 1981, although litigation prevented collection of this fee until three years later. Originally, the TIDF was developed to offset the increased marginal operating and capital costs incurred by MUNI in the late 1970s, during the boom in office development. In response to increasing transit demand, this new fee was designed to provide expanded peak period transit service to downtown MUNI routes. While the appli-

cation of this fee was originally limited to all new and converted office space in downtown San Francisco, in 2004, City legislation expanded its application to most non-residential uses throughout the City.

Annual revenues from the TIDF are shown in Table 7.5. They have been inflation adjusted to 2008 dollars.

- *Table 7.5 TIDF Revenues Collected (Inflation-Adjusted), Fiscal Years 2002-2008* — TIDF revenues have fluctuated greatly over the years depending on the number and sizes of projects subject to the transit impact development fee. In Fiscal Year 2005-06, revenues reached an all-time high, with over \$11 million collected. The 2008 revenues dropped by 56% from those collected in Fiscal Year 2007.

TABLE 7.1 MODE SPLIT FOR COMMUTERS, 2000-2008

Table 7.1 presents the most recent mode split data for San Francisco's residents and employees. It is shown in terms of the percentages of all trips.

Mode	Residents					Employees		
	2000	2002	2004	2006	2008	2004	2006	2008
Drive Alone	41.0	42.4	42.3	40.5	38.4	38.8	37.7	36.5
Carpool/Vanpool	9.3	8.7	8.7	7.7	8.4	11.9	10.5	11.1
Transit	32.2	30.8	29.6	30.3	31.9	34.9	35.8	36.4
Walk	6.5	8.0	8.2	9.6	9.4	5.9	6.9	6.7
Bicycle	1.8	2.1	1.8	2.3	2.7	1.6	1.5	2.0
Work at Home	4.8	6.5	7.7	7.6	7.5	5.3	5.4	5.3
Other	4.4	1.5	1.7	2.0	1.7	2.0	2.2	2.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source:
• US Census, American
Community Surveys 2000
2002, 2004, 2006, 2008

TABLE 7.2 PARKING ENTITLEMENTS, 2004-2008

Table 7.2 presents the most recent data on parking entitlements in San Francisco.

Zoning District	2004		2005		2006		2007		2008	
	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces
C-2			1	21			1	620		
C-3	2	243	5	730	12	2,368	2	296	4	347
C-M							1	40	2	70
DTR					2	616				
M-1	3	368	3	468					1	10
M-2	2	186	1	35	1	163				
NC-1							2	24	1	49
NC-2							1	24	3	125
NC-3	2	21	1	48	3	189	2	100	2	62
NCD	1	12	2	42	2	18	1	37	3	161
P	1	25							1	310
RC-4	1	2	7	626			1	35	2	180
RH-1	1	4					1	1		
RH-2	1	216	2	3					1	1
RH-3	1	1	1	3					1	28
RM-1	1	4					1	7	1	739
RM-3	1	1					1	39	1	2
RM-4			2	367						
RSD	1	40	1	14						
SLI	2	13							2	131
SLR	1	20	1	42	1	11	2	58		
SSO	1	35			1	44				
TOTAL	22	1,191	27	2,399	27	2,399	16	1,281	25	2,215

Note:

- "C" refers to commercial districts
- "DTR" refers to downtown residential districts
- "M" refers to PDH districts
- "NC" and named areas refer to neighborhood commercial districts
- "P" refers to the public district
- "R" refers to residential districts
- "S" refers to support activity districts

Source:

San Francisco Planning Department

TABLE 7.3 PRIVATE VEHICLE OCCUPANCY IN SAN FRANCISCO, 2000-2008

Table 7.3 presents data on private vehicle occupancy rates in San Francisco. It describes the average number of people per trip in San Francisco.

Population	2000	2002	2004	2006	2008
San Francisco Residents	1.22	1.20	1.20	1.11	1.14

Sources:

US Census American Community Survey, 2000, 2002, 2004, 2006, 2008

TABLE 7.4 TRANSIT RIDERSHIP ON MUNI LINES, 2005-2007

Table 7.4 presents data on average daily ridership on MUNI lines for 2005 and 2007.

Daily Ridership by Route

Route Nos.	Route Name	2005	2007	Ridership Difference	Percentage Change
1, 1AX, 1BX	California	29,896	26,108	-3,788	-12.7%
2	Clement	5,635	7,113	1,478	26.2%
3	Jackson	3,649	4,216	567	15.5%
4	Sutter	3,942	1,697	-2,245	-57.0%
5	Fulton	13,184	14,039	855	6.5%
6	Parnassus	6,610	7,158	548	8.3%
7	Haight	5,863	1,693	-4,170	-71.1%
9, 9AX, 9BX, 9X	San Bruno	28,645	32,197	3,552	12.4%
10	Townsend	3,056	3,155	99	3.2%
12	Folsom	7,376	6,928	-448	-6.1%
14, 14L, 14X	Mission	47,147	40,500	-6,647	-14.1%
15	Third Street	30,440	29,524	-916	-3.0%
16AX, 16BX	Noriega Express	1,643	1,822	179	10.9%
17	Parkmerced	1,510	1,348	-162	-10.7%
18	46th Avenue	3,578	3,414	-164	-4.6%
19	Polk	10,395	9,232	-1,163	-11.2%
21	Hayes	12,279	8,749	-3,530	-28.7%
22	Fillmore	22,806	18,892	-3,914	-17.2%
23	Monterey	4,529	4,421	-108	-2.4%
24	Divisadero	11,355	10,717	-638	-5.6%
26	Valencia	4,245	2,944	-1,301	-30.6%
27	Bryant	9,157	7,415	-1,742	-19.0%
28	19th Avenue	9,924	9,689	-235	-2.4%
29	Sunset	16,596	14,961	-1,635	-9.9%
30, 30X	Stockton	31,186	26,160	-5,026	-16.1%
31, 31AX, 31BX	Balboa	10,280	10,705	425	4.1%
33	Stanyan	6,167	5,536	-631	-10.2%
35	Eureka	737	734	-3	-0.4%
36	Teresita	1,015	1,762	747	73.6%
37	Corbett	1,421	1,789	368	25.9%
38, 38L, 38AX, 38BX	Geary	51,124	56,473	5,349	10.5%
39	Coit	404	390	-14	-3.5%
41	Union	3,345	3,060	-285	-8.5%
43	Masonic	14,264	12,765	-1,499	-10.5%
44	O'Shaughnessy	13,275	12,872	-403	-3.0%

CONTINUED

TABLE 7.4 TRANSIT RIDERSHIP ON MUNI LINES, 2005-2007 (CONTINUED)

Daily Ridership by Route

Route Nos.	Route Name	2005	2007	Ridership Difference	Percentage Change
45	Union- Stockton	15,994	12,660	-3,334	-20.8%
47	Van Ness	16,529	12,792	-3,737	-22.6%
48	Quintara- 24th Street	9,660	9,270	-390	-4.0%
49	Van Ness- Mission	26,206	25,266	-940	-3.6%
52	Excelsior	3,082	2,387	-695	-22.6%
53	Southern Heights	1,146	961	-185	-16.1%
54	Felton	5,707	8,288	2,581	45.2%
56	Rutland	205	218	13	6.3%
66	Quintara	774	772	-2	-0.3%
67	Bernal Heights	2,242	2,441	199	8.9%
71, 71L	Haight-Noriega	11,515	12,419	904	7.9%
80X	Gateway Express	N/A	132	132	-
81X	Caltrain Express	N/A	125	125	-
82X	Levi Plaza	307	268	-39	-12.7%
88	BART Shuttle	732	832	100	13.7%
89	Laguna Honda	179	179	0	0.0%
90	Owl	N/A	353	353	-
91	Owl	N/A	648	648	-
108	Treasure Island	1,958	3,372	1,414	72.2%
F	Market	14,139	18,520	4,381	31.0%
J	Church	20,018	16,695	-3,323	-16.6%
K	Ingleside	18,263	18,444	181	1.0%
L	Taraval	28,607	29,842	1,235	4.3%
M	Ocean View	24,681	28,671	3,990	16.2%
N	Judah	39,632	45,252	5,620	14.2%
TOTAL		668,254	650,985	-17,269	-2.6%

Source: San Francisco Municipal Transportation Agency

TABLE 7.5 TRANSIT IMPACT DEVELOPMENT FEE (TIDF) REVENUE COLLECTED (INFLATION-ADJUSTED). FISCAL YEARS 2002-2008

Table 7.5 presents data on TIDF revenues collected in San Francisco since Fiscal Year 2001-2002, inflation adjusted to reflect costs in 2008.

Fiscal Year	Fee Structure	Collections (2008 \$)
2001 - 2002	1981 Ordinance	\$9,024,347
2002 - 2003	1981 Ordinance	\$4,524,214
2003 - 2004	2004 Ordinance	\$1,496,904
2004 - 2005	2004 Ordinance	\$1,016,642
2005 - 2006	2004 Ordinance	\$11,901,530
2006 - 2007	2004 Ordinance	\$2,044,236
2007 - 2008	2004 Ordinance	\$889,475

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Gavin Newsom

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